Daikin ENVi Thermostat installation overview

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Presenter's Name

Presenter's Title

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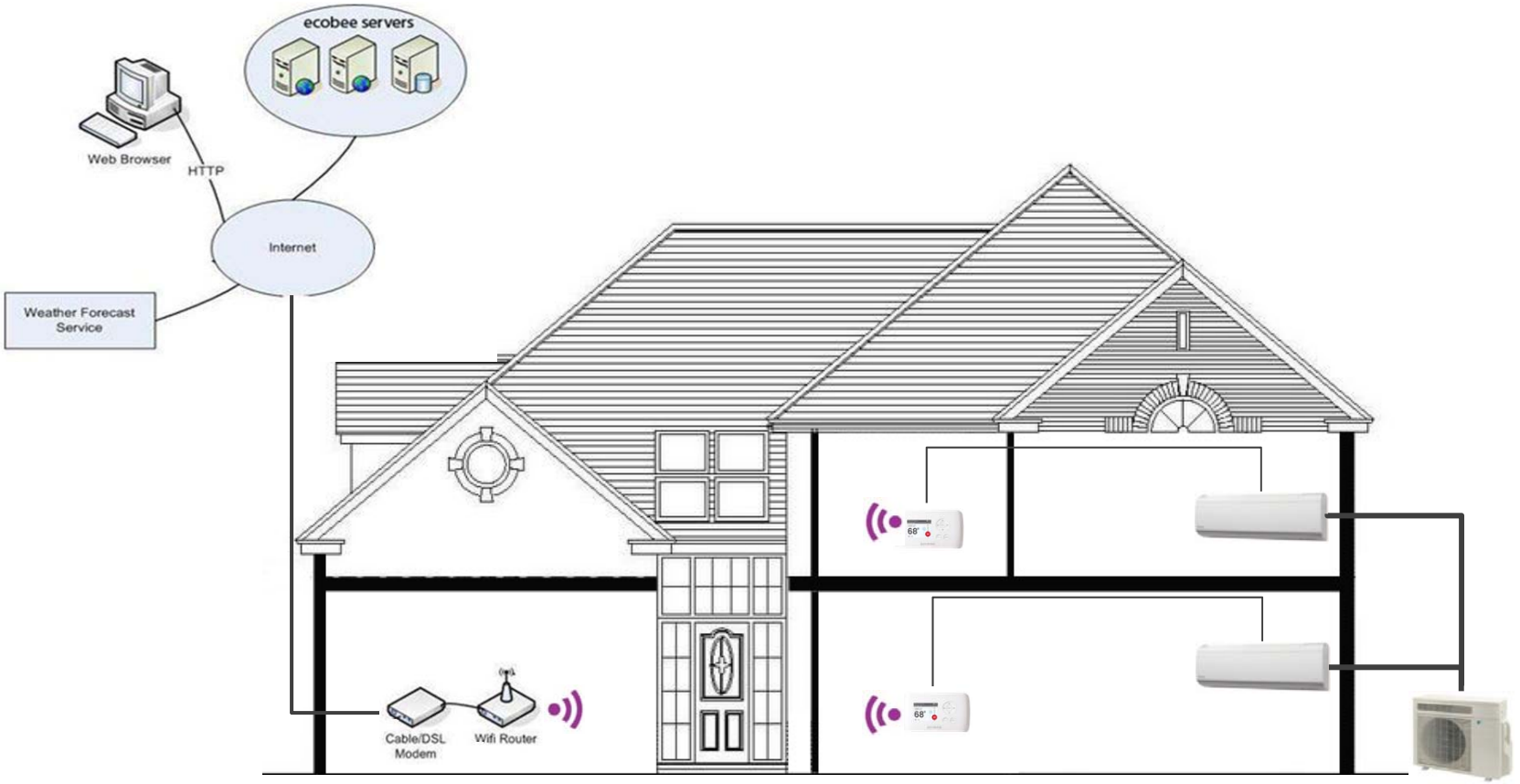
Daikin ENVi system overview (web-based thermostat)



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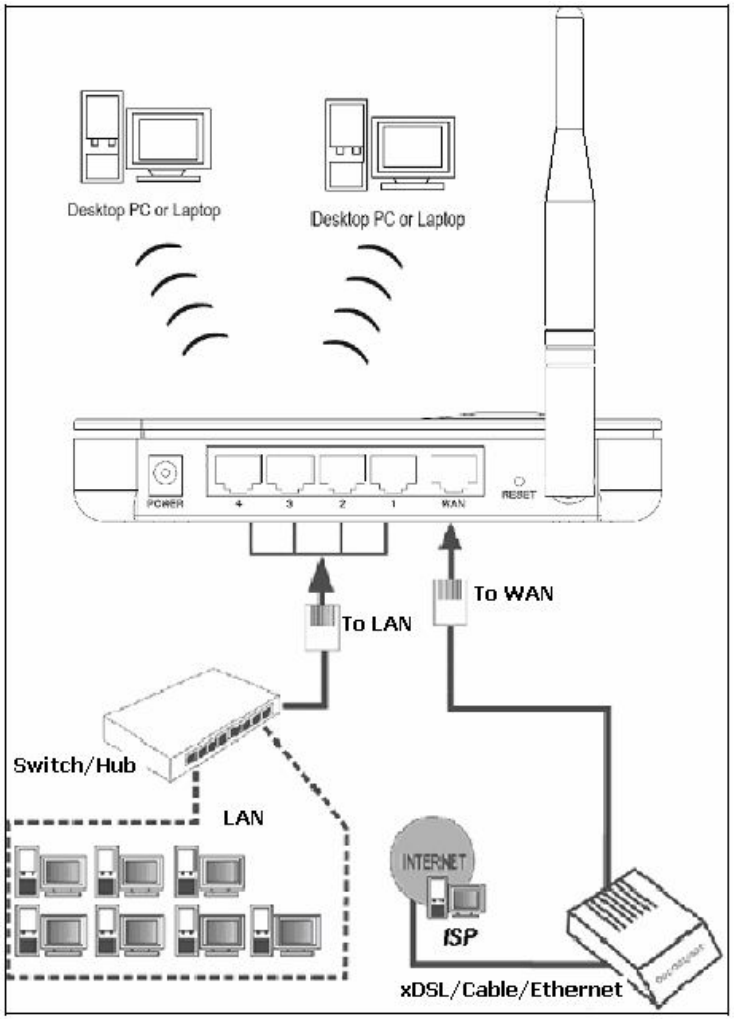
Daikin ENVi System Overview (Local Area Network)

Wi-Fi Support:

- Broadband Internet (Cable/DSL/Satellite/3G-4G)
- Compatible with all the 802.11b/g/n
- Support WEP / WEP128 / WPA / WPA2 encryption for advanced security
- DHCP or Static IP
- SSID
- Wi-Fi Channels (1-11)
- IP Address and IP Subnet
- Gateway Address
- Primary & Secondary DNS
- MAC Address



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Daikin ENVi System Components

ENVi Thermostat

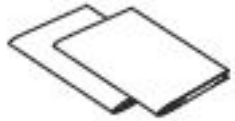
Trim Plate

DPCA with Power Cable

Wiring Harness

Double-Sided Adhesive

Screws (4) and Drywall Anchors (4)


Installation and User Manuals

Serial Number Sticker

Wire Ties (2)

Contents in box:

1 – Daikin ENVi Thermostat
1 – Trim Plate
1 – Daikin Power and Communication Adaptor (DPCA)
1 – Wiring Harness
1 – Double-Sided Adhesive
1 – Set of fasteners
1 – Serial Number Sticker
1 – Set (2) Wire Ties
1 – User manual / Installation Manual

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Daikin Equipment Compatibility

The Daikin ENVi thermostat is designed to operate only with Daikin Heat Pump and Cooling Indoor Units where the BRC944 wired remote controller is applicable.

Equipment Compatibility

- Single-Split system
- Multi-Split system (2 to 8 ports)
- SkyAir FTXS Indoor Units

Applicable indoor unit models:

FTXS, FTXN (09/12 requires KRP980B1 interface adaptor), CTXS, FDXS, and CDXS

The Daikin ENVi thermostat also supports single-stage auxiliary heating

⚠ *Any auxiliary heater that requires air flow from the Indoor Unit should be equipped with an air flow switch for safety. The indoor unit fan could stop during a defrost cycle and other situations.*

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Daikin ENVi - system specifications

Thermostat Specifications

Temperature

- Heat Set Point Range 45 to 80 °F (7 to 26.5 °C)
- Cool Set Point Range 64 to 95 °F (18.5 to 35 °C)
- Display Range 40 to 100 °F (5 to 37 °C)
- Sensitivity +/- 1 °F (0.5 °C)
- Operating Range 32 to 130 °F (0 to 55 °C)

Humidity

- Display Range 20 to 90% R.H.
- Sensitivity +/- 5% R.H.
- Operating Range 5 to 95% R.H (non-condensing)

Dimensions

- Width x Height x Depth 5.5 x 3.25 x 1 inches (139.5 x 82.5 x 25mm)

Power

- 24 VAC, 3VA (provided from the DPCA)

Auxiliary Heater Relay

- 30VAC, MAX Current 3A

DPCA Specifications

Temperature

- Operating Range 20 to 140 °F (–7 to 60 °C)

Humidity

- Operating Range 5 to 95% R.H (non-condensing)

Dimensions

- Width x Height x Depth 4.7 x 2.0 x 1.3 inches (120 x 50 x 32.5 mm)

Power

- 208/230 VAC (provided from Indoor Unit)

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Pre-Install: Wiring (Verify existing thermostat wire)

- The Daikin ENVi thermostat uses a standard 4-wire thermostat connect to the Daikin Power and Communication Adapter (DPCA) which connects to the Indoor Evaporator Unit.

- Wiring specs are:

	18 AWG	20 AWG	22 AWG
Thermostat to DPCA	1250ft/380m	800ft/240m	500ft/150m

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Installing the Daikin ENVi Thermostat Kit

There are 6 steps to installing the Daikin ENVi thermostat kit:

Step 1. Power Off the Daikin Indoor Unit

⚠ WARNING: The Indoor Unit uses a high-voltage 208/230V power source. Always DISCONNECT power to the Indoor Unit before connecting any power wires. Failure to do so can result in death, fire or electrical shock.

Step 2. Position and Wire the DPCA

Position the DPCA in a suitable location away from water near the Indoor Unit (for example, the backside cavity of a wall-mounted unit). The DPCA is not plenum rated and should be mounted in a non-plenum space.

Step 3. Install the Daikin ENVi thermostat

The ideal location for the thermostat is approximately 5 ft (1.5 m) above floor level in the main living area.

Step 4. Connect the Thermostat Wiring

Use the field-supplied 4-wire low-voltage thermostat cable to connect the thermostat to DPCA.

Step 5. Mount the DPCA

After the necessary wiring connections are completed, mount the DPCA using the adhesive stickers or mounting screws as needed.

Step 6. Power On the Daikin Indoor Unit

After the wiring is completed, power can be applied to the Daikin Indoor Unit.

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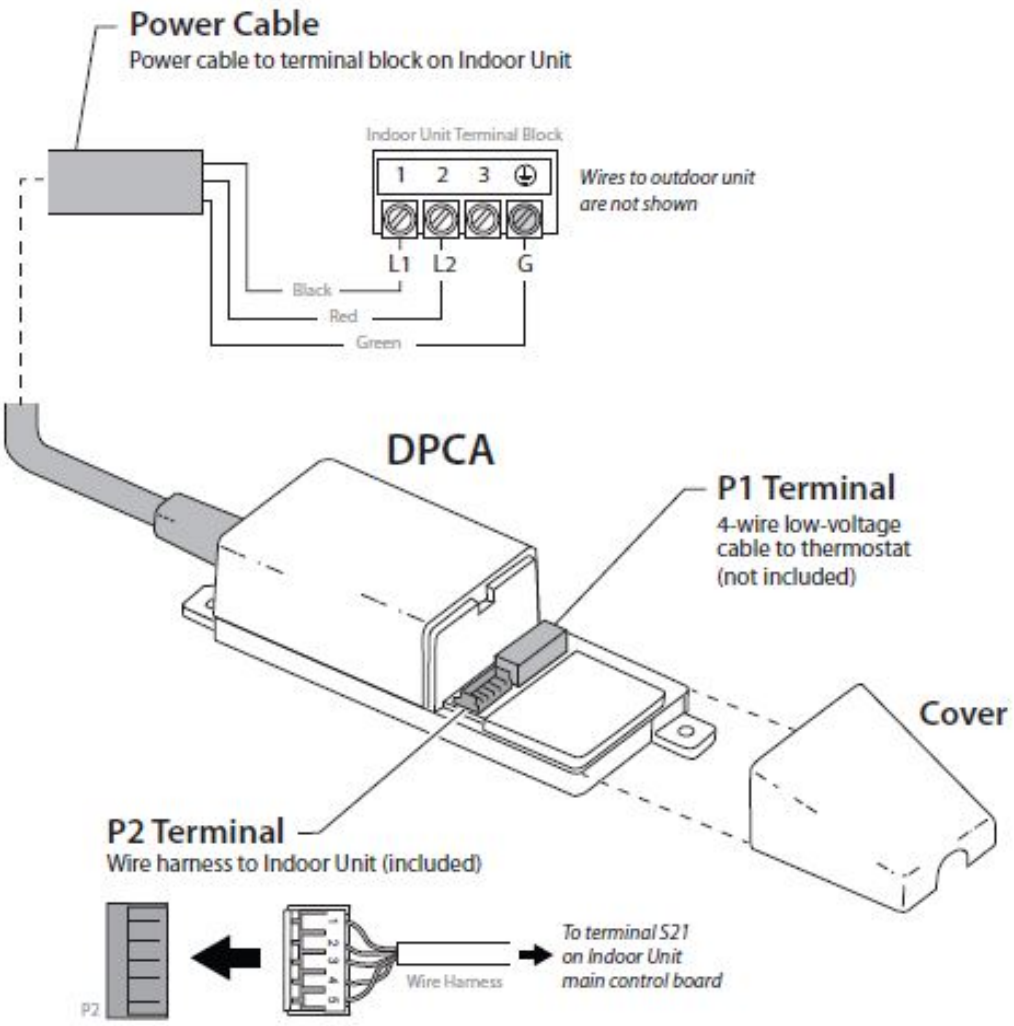
Installing the Daikin Power and Communication Adaptor



Step 1.

Disconnect power to Indoor Unit

Step 2.

The Daikin Power and Communication Adaptor (DPCA) provides an interface between the Thermostat and Indoor Unit.

To install the DPCA:

1. Position the DPCA in a suitable location away from water near the Indoor Unit (for example, the backside cavity of a wall-mounted unit).
2. Connect the DCPA power cables to the indoor Unit power supply terminals. Ensure the electrical connections are securely tightened.
3. Remove the DPCA cover by grasping both sides and pulling along the length of the DPCA.
4. Use the Wiring Harness to connect the P2 terminal on the DPCA to the S1 terminal on the Indoor Unit's main PCB. Refer to Daikin system installation manual for information about accessing the S21 terminal.

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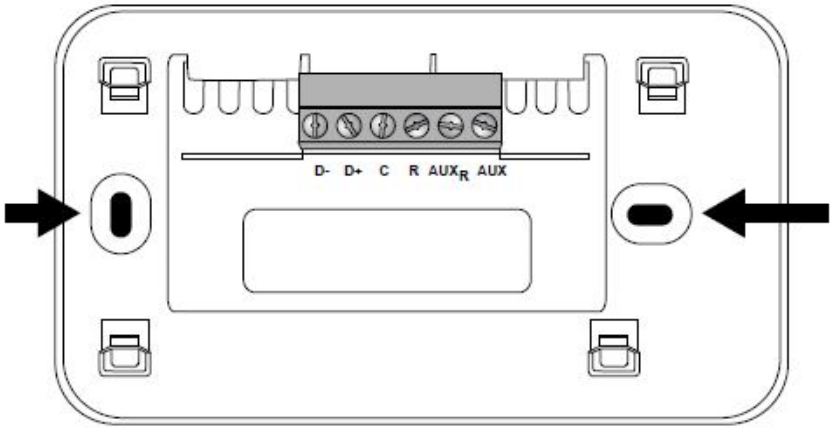
Installing the Daikin ENVi Thermostat

Do not install the thermostat:

- Close to sources of heat such as incandescent lights
- Near supply heating/cooling sources
- In direct sunlight
- On exterior, non-insulated or poorly insulated walls
- In Kitchen or other areas of potentially high heat and/or humidity
- In an area that could restrict airflow



Mounting holes

- Accommodates up to a #6 screw
- Ensure terminal block is on the top

Step 3.

1. If necessary, remove existing thermostat.

2. Gently separate the backplate on the wall. Make sure the any existing wires can be inserted through the opening for the wiring. If the backplate does not adequately cover the area of the previous thermostat, attach the trim plate to the backplate for increased coverage.

3. Using the backplate as a template and a level, mark the location of the mounting holes.

4. Move the backplate away from wall and make the holes to accommodate the included drywall anchors.

5. Fasten the backplate and optional trim plate to the wall using the provided #6 pan-head screws.

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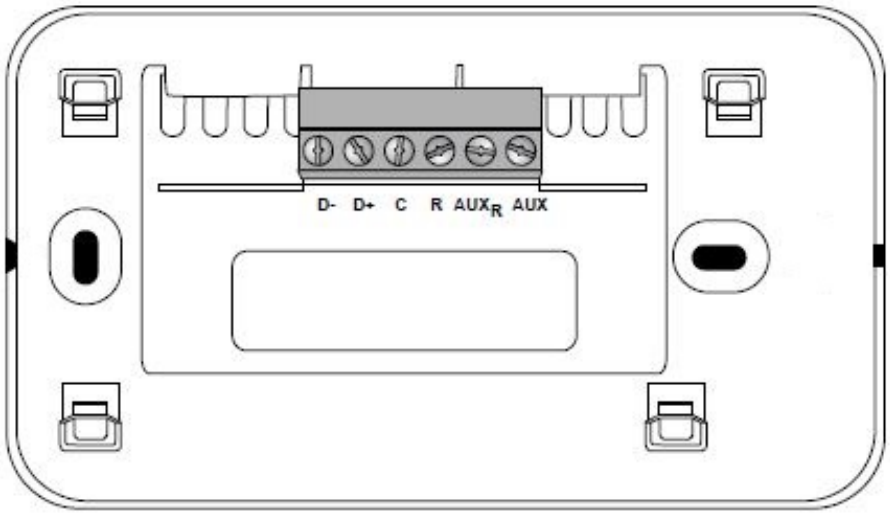
Thermostat Terminals



Terminal	Description
D-	Data Communication
D+	Data Communication
C	Common (24VAC) from DPCA module
R	24VAC from DPCA module
AUXr	To Auxiliary Heater Control
AUX	To Auxiliary Heater Control

• Note: AUX/AUXr is a normally open relay and does not share power with R and C terminals.

• 24VAC must be provided from the Auxiliary Heating Unit.

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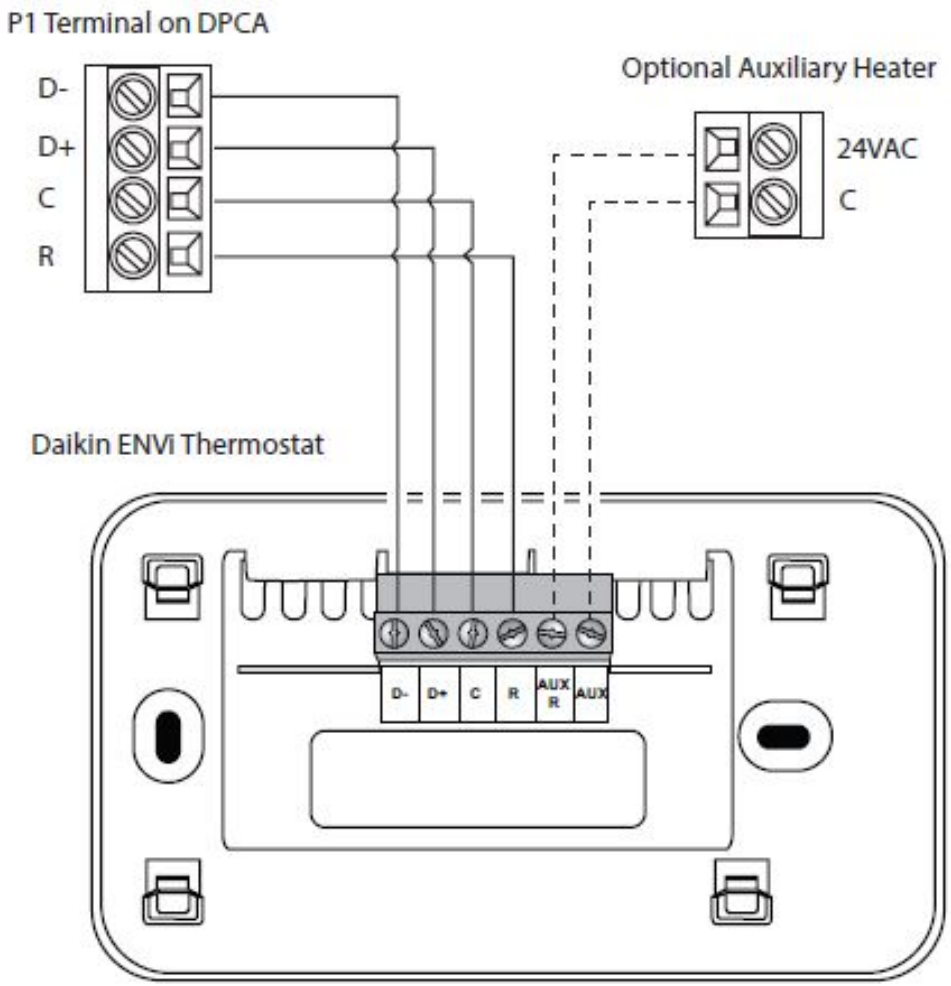
Connect the Thermostat Wiring , Secure DPCA and Power On Daikin Indoor Unit



Step 4.

1. Connect the wires as illustrated.
2. Ensure all wiring connections are secure.
3. Attach the Daikin ENVi thermostat to the thermostat backplate. Ensure that the pins on the thermostat align with the terminal block on the backplate.

Step 5.

Mount the DPCA

After the wiring connections are complete mount the DPCA using the adhesive sticker or mounting screws as needed.

Step 6.

Power On Daikin Indoor Unit

After you power on the Indoor Unit:

1. Verify the green LED on the DPCA has illuminated. Upon verification, re-attach the DPCA cover.
2. Use the wire ties to secure the wires as needed.

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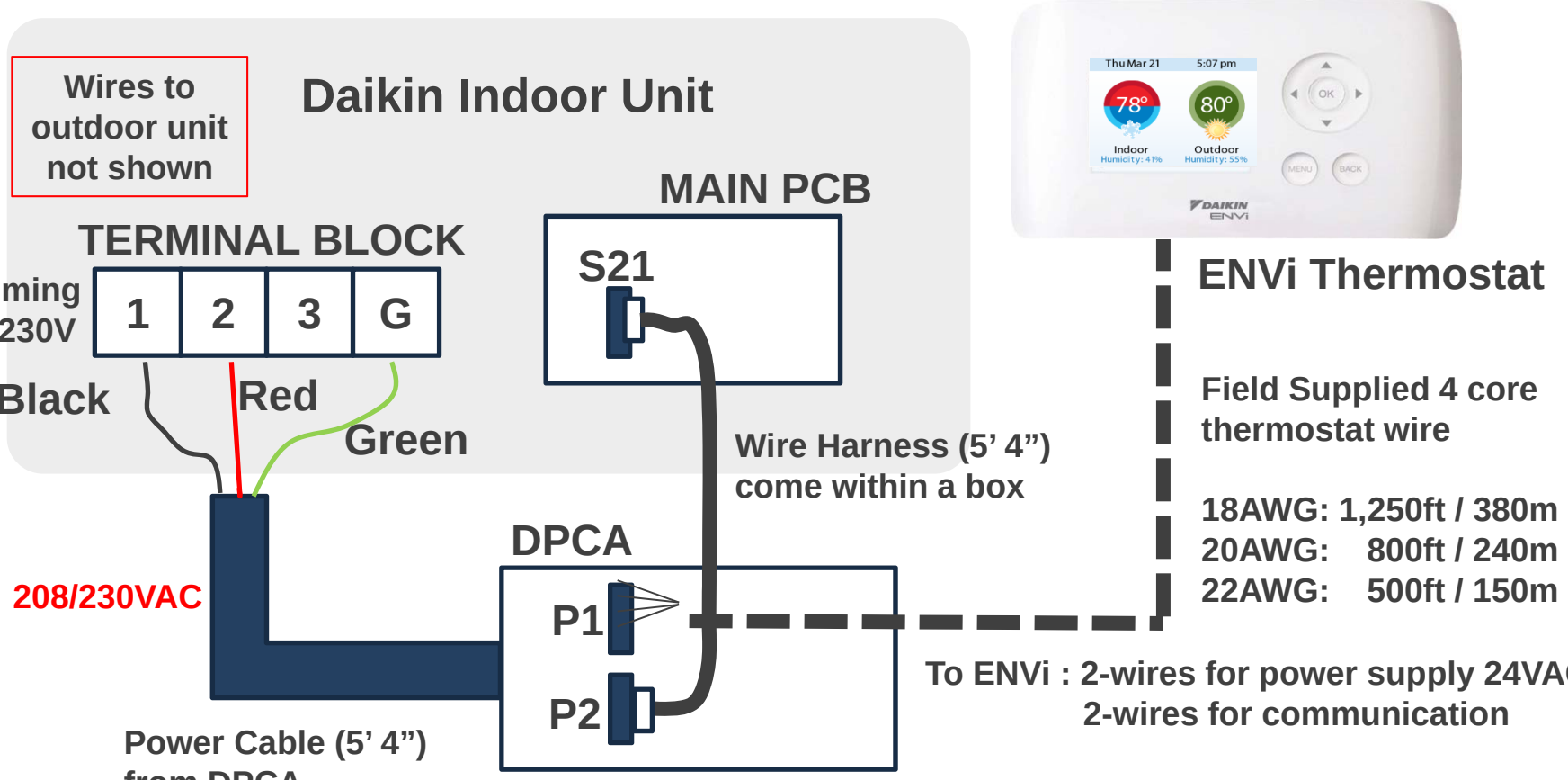
Entire Wiring Schematic



DPCA can be installed in the backside cavity of the wall-mounted indoor unit (if space allows) and beside the ducted indoor unit. DPCA should not be installed in plenum.

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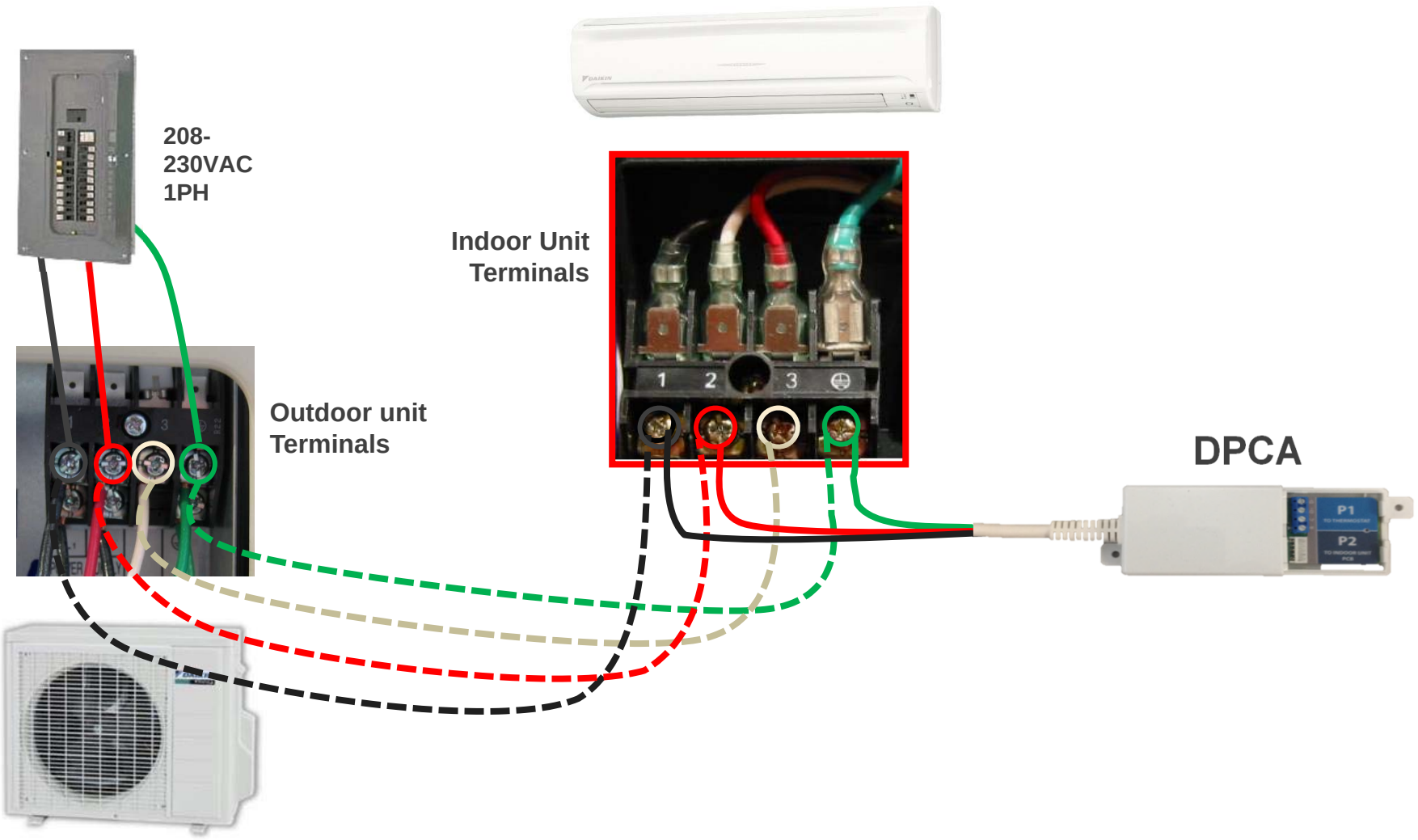
DPCA Power Wiring 1/2



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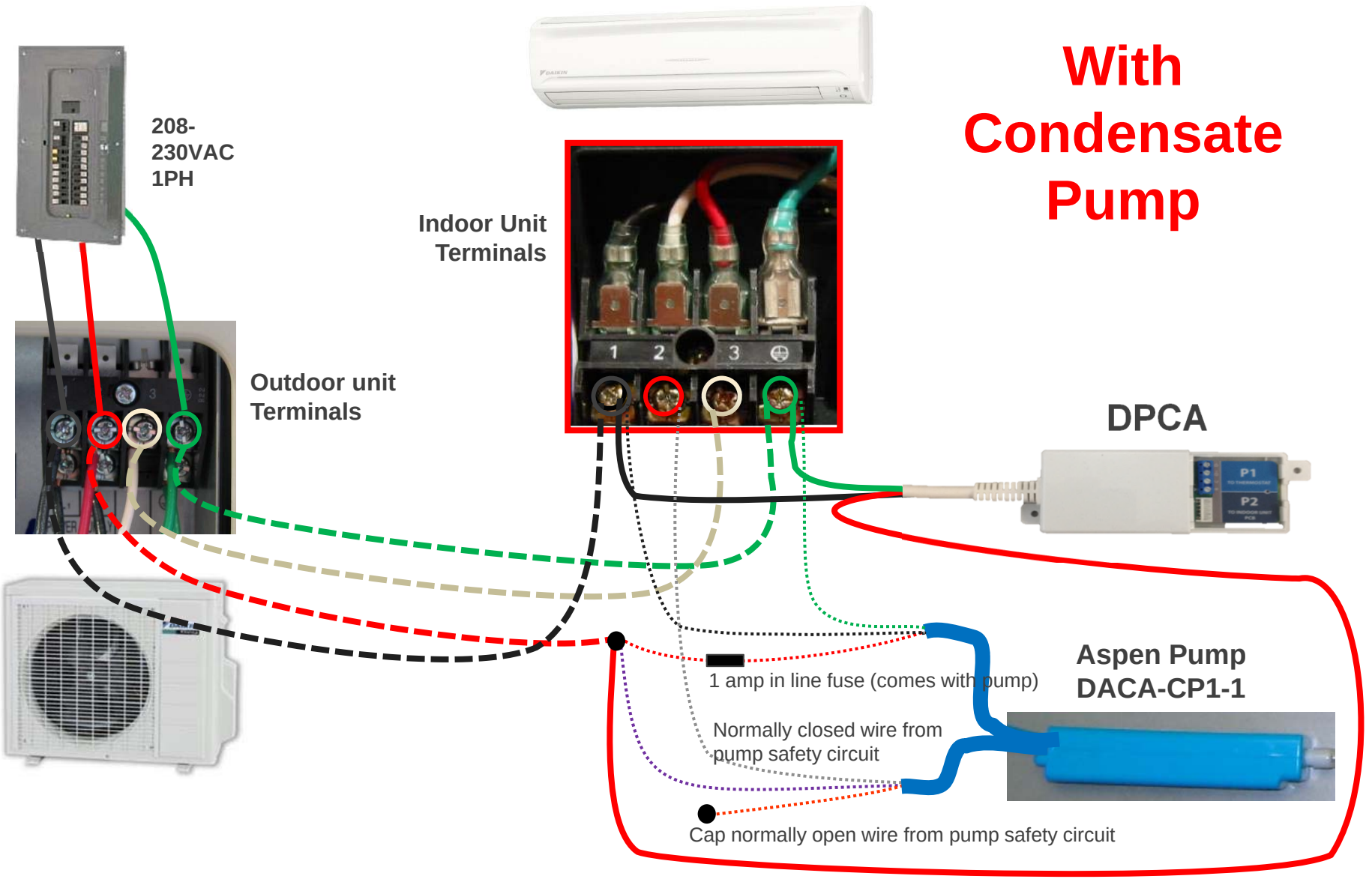
DPCA Power Wiring 2/2



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Daikin ENVi Thermostat: The Home Screen

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Configuring the Daikin ENVi Thermostat - Preferences

The first step after installing the Daikin ENVi thermostat is to configure the thermostat settings for the Indoor Unit.

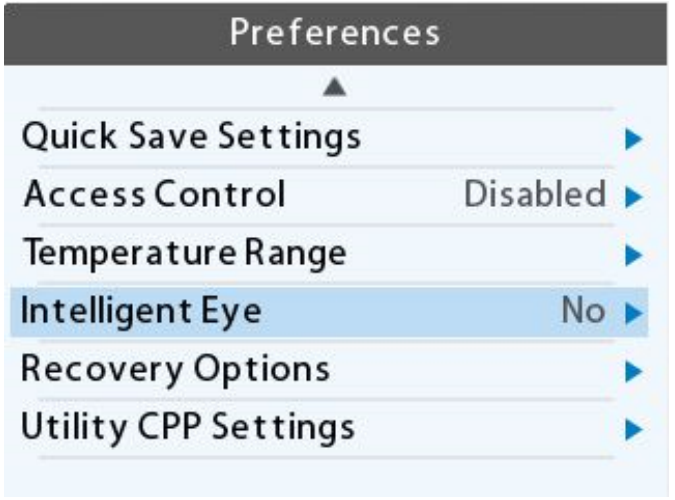
Intelligent Eye: Menu > Settings > Preferences > Intelligent Eye > Yes/No

- Some models of the Indoor Unit include an intelligent eye, an infrared sensor that detects room occupancy. It adjust the set point by 3.6°F (2°C) if no movement is detected in order to save energy (+3.6°F/+2°C if cooling,-3.6°F/-2°C if heating).

- To use intelligent eye, you must enable this option in the Daikin ENVi thermostat and then enable it with the Daikin wireless remote controller. If enabled, the thermostat's Smart Recovery and Temp Alert functions are not available.

- By default, intelligent eye is disabled on the thermostat.

- *Do NOT enable the intelligent eye with the Daikin wireless remote controller when it is disabled on the thermostat as this may cause suboptimal operation and result in invalid recovery and alert messages. Also, if an auxiliary heater is configured, enabling intelligent eye may energize the auxiliary heater more often than would normally be required.*



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Configuring the Daikin ENVi Thermostat - Installation Settings

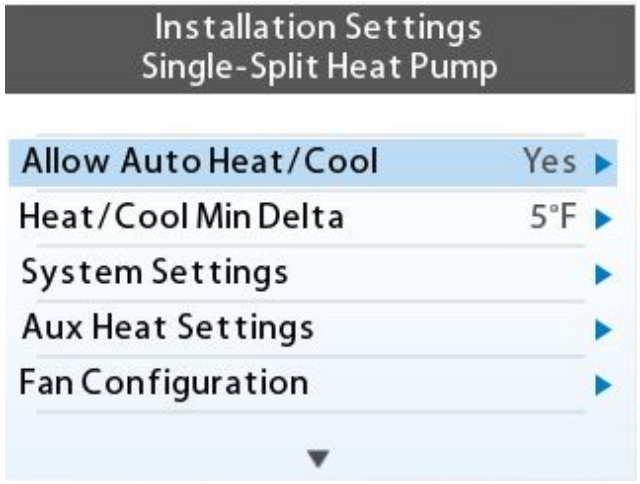
Installation Settings: From Home screen select Menu > Settings > Installation Settings

Allow Auto Heat/Cool

- Enabling this option allows the user to select auto change-over as a system mode.
- *Only visible if the Indoor Unit supports heat or an auxiliary heat source is configured.*

Heat/Cool Min Delta

- Sets the minimum difference between the heat mode set temperature and the cool mode set temperature when the system mode is in auto-changeover. The delta is adjustable from 2 to 10 °F (1.1 to 5.5 °C). The default value is 5 °F (2.8 °C).
- *Only visible if the Indoor Unit supports heat or an auxiliary heat source is configured.*



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Configuring the Daikin ENVi Thermostat – System Settings

System Settings: Menu > Settings > Installation Settings > System Settings

- **Min Cycle Off Time** Sets the minimum equipment off time between cool cycles: 240 to 900 seconds (default is 240 seconds).

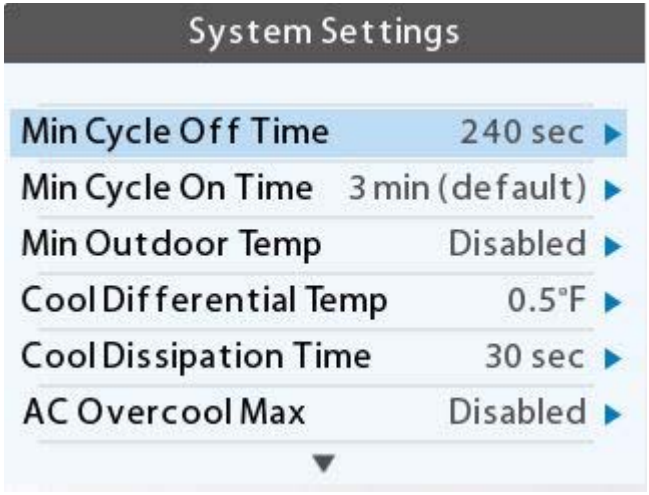
- **Min Cycle On Time** Sets the minimum equipment run time in cool mode: 1 to 20 min (default is 3 min).

- **Min Outdoor Temp** Disables the compressor when the outside air temperature reaches the configured minimum setting. This performs two functions. It prevents the compressor from running when the outdoor temperature is too low, thus resulting in damage to the compressor. You can also set this value to determine when you want the auxiliary heat (if installed) to engage to help meet the set temperature. The temperature range is adjustable from -10 to 65 °F (–23.3 to 18.3 °C) or disabled by default.

- *This feature uses the Internet to obtain the current outdoor temperature. If no Internet is available, the Outdoor Unit's temperature sensor is used instead*.

- **Cool Differential Temp** The minimum difference between the current temperature and set temperature before the system calls for cool. A smaller difference means shorter cycle times, whereas a larger difference results in longer cycle times. The temperature range is adjustable from 0.5 to 3 °F (0.3 to 1.7 °C) in 0.5°F (0.3°C) increments.

- **Cool Dissipation Time** The amount of time the fan will run after the cool has been turned off. Running the fan for a period of time allows for any cooled air left in the ducts to circulate throughout the home. The time is adjustable from 0 to 900 seconds (default is 0 seconds).



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Configuring the Daikin ENVi Thermostat – System Settings (continued)

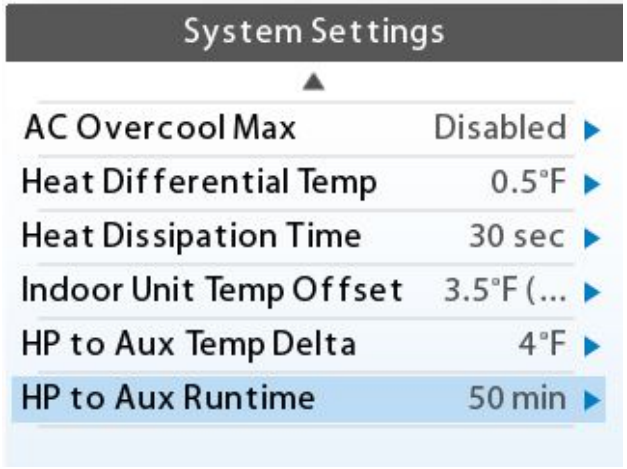
- **AC Overcool Max** When using the AC to dehumidify, the setting configures how many degrees below the current set point the thermostat will run in order to reach the dehumidify set point. Options are Disabled (default) and 0.5 to 3 °F (0.3 to 1.8°C) in 0.5 F (0.3°C) increments.

- **Heat Differential Temp** The minimum difference between the current temperature and set temperature before the system calls for heat. A smaller difference means shorter cycle times, whereas a larger difference results in longer cycle times. The temperature range is adjustable form 0.5 to 3 °F (0.3 to 1.7 °C) in 0.5°F (0.3°C) increments. The default offset is 0.5°F (0.3°C).

- *If the Indoor Unit is AC only and an auxiliary heater is configured, this option appears under the Aux Heat Settings menu.*

- **Heat Dissipation Time** The amount of time the fan will run after the heat set point has been reached and the call for heat has been turned off. Running the fan for a period of time allows for heated air to circulate throughout the home. The time is adjustable from 0 to 900 seconds (default is 0 seconds).

- *If the Indoor Unit is AC only and an auxiliary heater is configured, this option appears under the Aux Heat Settings menu.*



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Configuring the Daikin ENVi Thermostat – System Settings (continued)

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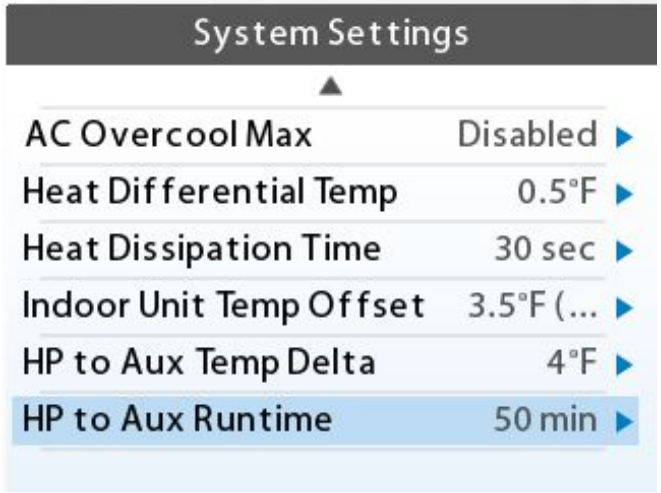
▪ **Indoor Unit Temp Offset** Depending on its type, the Indoor Unit uses a temperature offset for the heating set point, taking into consideration the higher sensing temperature. The Daikin ENVi thermostat applies the offset to the set point which is sent to the Indoor Unit. The offset should be 3.5°F (2.0°C) for wall-mounted and ducted indoor units, and 0°F (0°C) for floor-standing indoor units (available in the future). The offset range is adjustable from 0°F (0°C) to 5.5 °F (3.0°C) in 0.5°F (0.3°C) increments to allow for future indoor unit expansions. The default offset is 3.5°F (2.0°C).

▪ **Heat Pump to Aux Temp Delta** The minimum difference between the current temperature and the set temperature that will activate Aux Heat (regardless if the maximum run time of the heat pump was reached). Options are Auto (default) and 1 to 10 °F (0.6 to 5.6 °C).

▪ *Only visible if Indoor Unit supports heat and an auxiliary heat source is also configured.*

▪ **Heat Pump to Aux Runtime** The maximum amount of time the heat pump will run before engaging Aux Heat. Options are Auto (default), Disabled, and 10 to 180 minutes.

▪*Only visible if Indoor Unit supports heat and an auxiliary heat source is also configured.*



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Configuring the Daikin ENVi Thermostat – Installation Settings

Aux Heat Settings: Menu > Settings > Installation Settings > Aux Heat Settings

- The Aux Heat Settings configure an auxiliary heat source.

- *If you want to test the auxiliary heater during installation, set Aux Heat Installed to Yes and set Allow HP with Aux Heat to No. Then, adjust the heat set point to enable the auxiliary heater.*

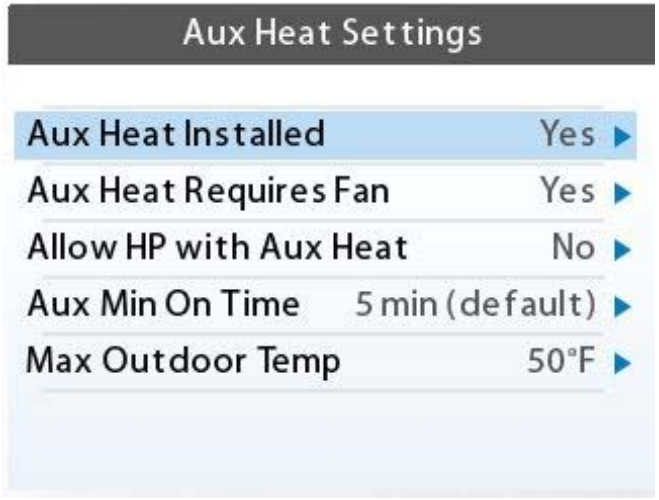
- **Aux Heat Installed** When set to Yes, configures the thermostat to control an auxiliary heat source.

- **Aux Heat Requires Fan** When set to Yes, configures the thermostat to control the fan when auxiliary heat is used.

- **Allow HP with Aux Heat** When set to Yes, it will turn on auxiliary heat in addition to the heat pump. For information about how auxiliary heat will be engaged with the heat pump, see the settings Heat Pump to Aux Temp Delta and Heat Pump to Aux Runtime.

- **Aux Min On Time** Sets the minimum equipment run time for auxiliary heat: 1 to 20 min (default is 5 min).

- **Max Outdoor Temp** Configures the maximum outdoor temperature threshold. Above this level, the auxiliary heat will not be activated. The temperature is adjustable from 0 to 80 °F (26.5 °C) in increments of 0.5°F (0.5°C). The default value is 70°F (21°C).



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Configuring the Daikin ENVi Thermostat – Installation Settings (continued)

Fan Configuration: Menu > Settings > Installation Settings > Fan Configuration

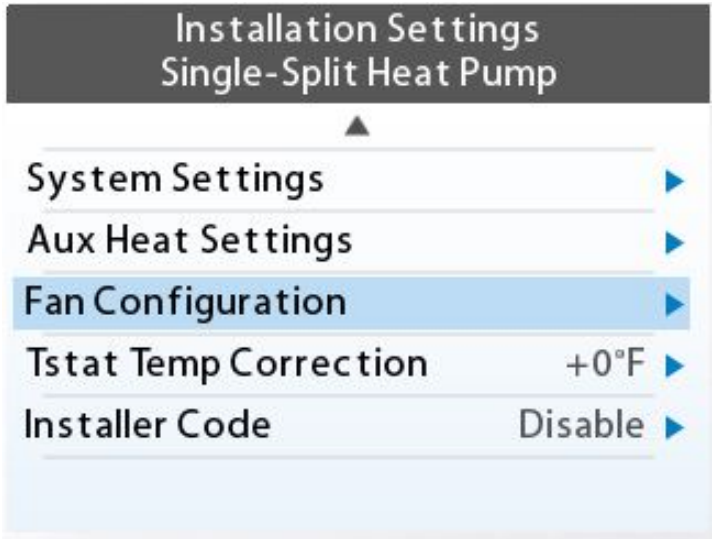
- The Fan Configuration settings map the Indoor Unit's internal fan speeds to the fan speed options displayed to the user on the thermostat.

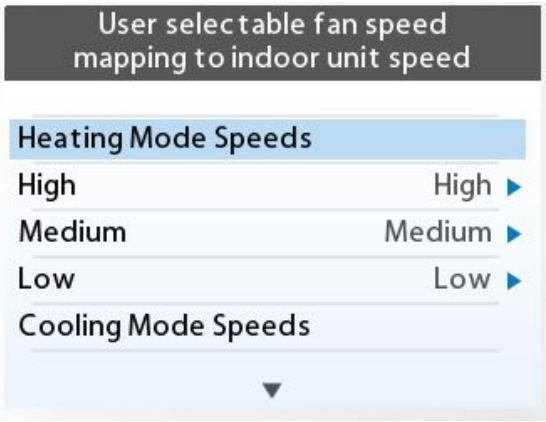
- **Heating Mode Speeds** Configures fan speed when the user selects High, Medium or Low while the system is in heat mode. The possible speeds for each value are High, Medium High, Medium, Medium Low, and Low.

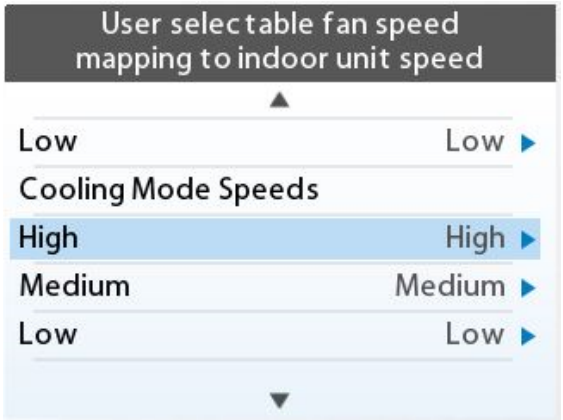
- **Cooling Mode Speeds** Configures fan speed when the user selects High, Medium or Low while the system is in cool mode. The possible speeds for each value are High, Medium High, Medium, Medium Low, and Low.

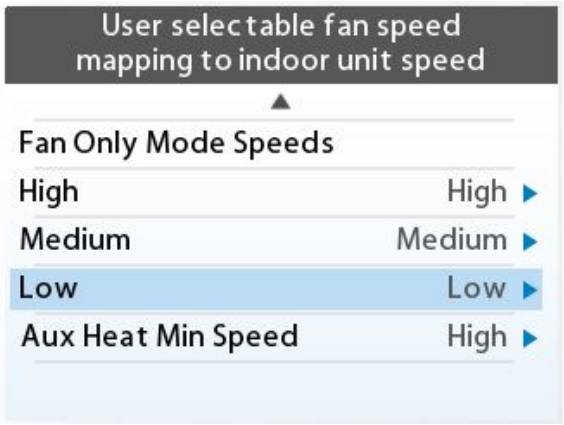
- **Fan Only Mode Speeds** Configures fan speed when the user selects High, Medium or Low while the system is not actively cooling or heating the room. The possible speeds for each value are High, Medium High, Medium, Medium Low, and Low.

- **Aux Fan Min Speed** Configures minimum fan speed used when Aux Heat requires a fan. The possible speed is High, Medium High, Medium, Medium Low, or Low.









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Configuring the Daikin ENVi Thermostat – Installation Settings (continued)

Force System Off: Menu > Settings > Installation Settings > Force System Off

▪ Force System Off is used to clear a latched system error status in the indoor unit by turning off the equipment for five seconds after system servicing. Operation will automatically resume with the previous settings once complete.

T-stat Temp Correction: Menu > Settings > Installation Settings > Tstat Temp Correction

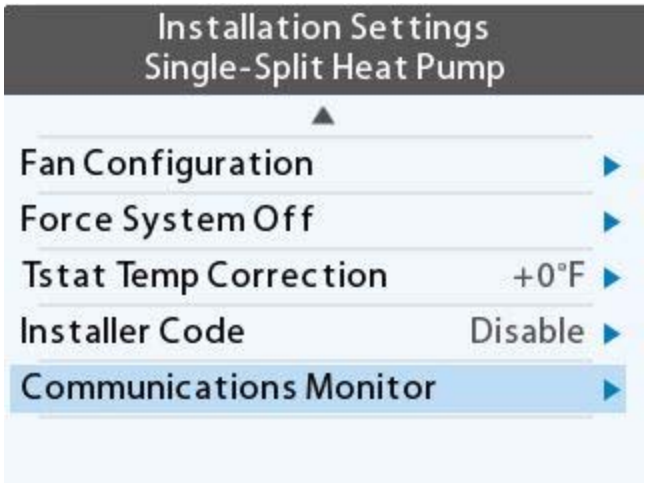
▪ Lets you program an offset between the real temperature at the thermostat and the displayed temperature. If you find that the temperature where the thermostat is located does not represent the room temperature, change the offset to compensate for the difference. The correct temperature is adjustable from +/- 10°F (+/-5 .6°C) in 0.5°F (0.3°C) increments.

Installer Code: Menu > Settings > Installation Settings > Installer Code

▪ To prevent accidental modifications to the installation settings, you can enable the following installer code: 3262. The code is fixed and cannot be changed.

Communications Monitor: > Menu > Settings > Installation Settings > Communications Monitor

▪ This will display the last register values for communication with the Indoor Unit**.**



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Configuring the Daikin ENVi Thermostat – Reminders & Alerts

Reminders and Alerts: Menu > Reminders and Alerts

The system service (maintenance) reminder generates an alert telling the homeowner that regularly scheduled maintenance is required. This reminder, along with technician contact information, can be displayed on the screen. If homeowners register their thermostats, the reminders will be emailed to them and be displayed in the web portal. You can set the Last Service date, turn the Reminder On or Off, and to set the Frequency of the maintenance interval in months.

Low Temp Alert

- Sets the temperature at which the thermostat will generate a Low Temperature Alert. The range can be:
- Disabled – No alert will be generated.
- Enabled - Set temperature range of 35 to 68 °F (1.5 to 20 °C).

High Temp Alert

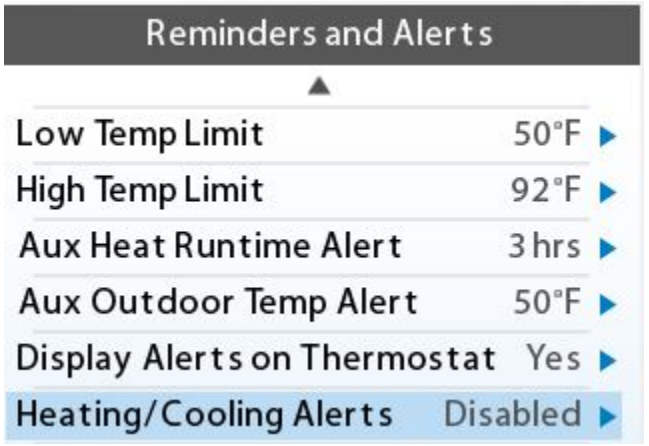
- Sets the temperature at which the thermostat will generate a High Temperature Alert. The range can be:
- Disabled – No alert will be generated.
- Enabled - Set temperature range of 60 to 104 °F (15.5 to 40 °C).

Display Alerts on Thermostat

- Select No if you do not want any of the alerts to be displayed on the Daikin ENVi thermostat screen. Alerts will continue to be displayed on the web portal and sent via email.

Enable Heating/Cooling Alerts

- Select No to disable alerts for heat/cool error conditions. If disabled, alerts indicating that the system failed to heat or cool will not be appear in the screen, web portal, or emails.



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Configuring the Daikin ENVi Thermostat – Resetting the Thermostat

Reset Equipment or User Settings: Menu > Settings > Reset

- You can restore equipment or user settings on the Daikin ENVi thermostat back to their factory defaults.

- **Reset Registration** Resets the connection between the Daikin ENVi thermostat and the user's personalized Web Portal.

- **Preferences and Schedule** Resets all preferences, reminders, alerts and programming back to the default state.

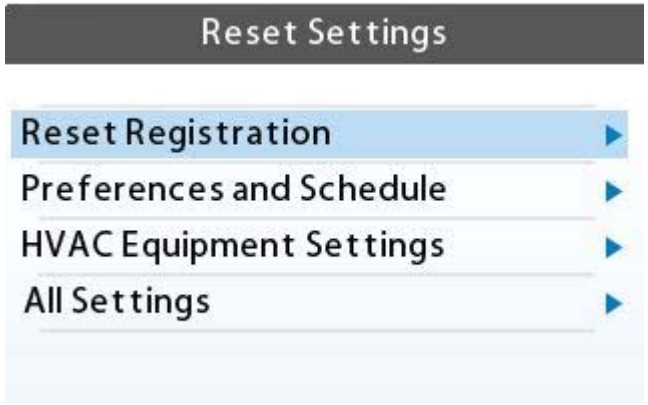
- **HVAC Equipment Settings** Resets the configuration of the Indoor Unit and/or auxiliary heat equipment.

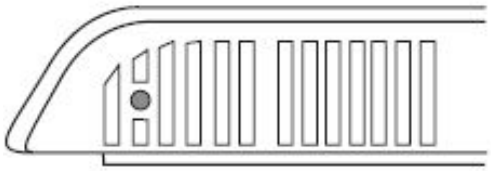
- **All Settings** Resets the Daikin ENVi thermostat back to its default factory settings.

- **Reset Contractor Info** Resets any information about the Contractor who installed the Daikin ENVi thermostat.

Rebooting the Daikin ENVi thermostat

- You can reboot the Daikin ENVi thermostat by pressing the physical hardware reset button, located through an opening in the bottom left corner of the Daikin ENVi thermostat. Rebooting will not alter programming or configuration options.





Reset button

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Configuring the Daikin ENVi Thermostat – Sensors

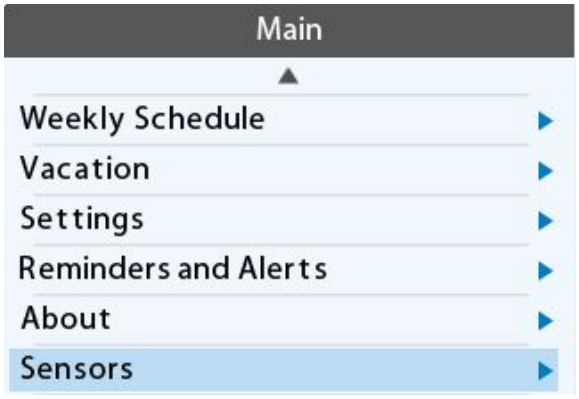
Menu > Sensors > Configure

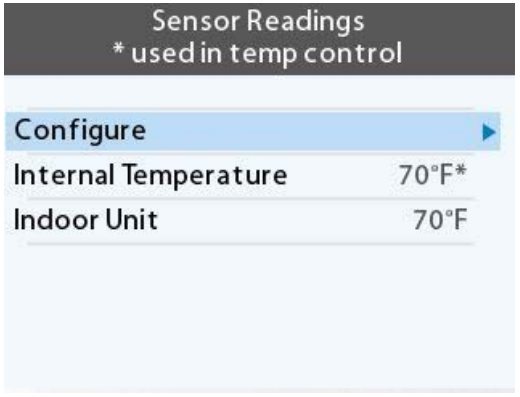
Sensors

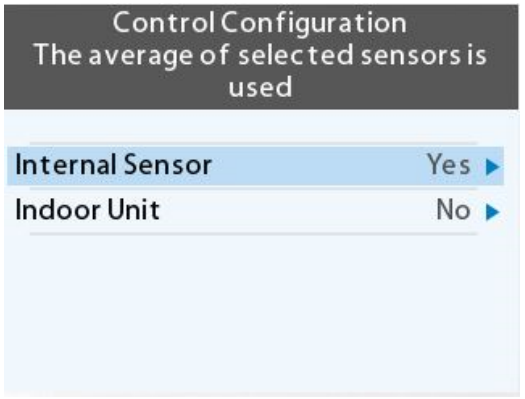
By default, the Daikin ENVi thermostat's Internal Sensor is used for an accurate indication of the room temperature (recommended settings).

The Indoor Unit is also equipped with a room temperature sensor which you can use instead. You can also enable both sensors to provide an average sensing temperature. However, the Indoor Unit sensor and averaging methods are not recommended because the Indoor Unit sensor, especially wall-mounted models, can be affected by certain operations such as starting up and defrosting in a short time which may cause improper control of the Indoor Unit by the ENVi Thermostat.

▪ Enable or disable each sensor by selecting **Internal Sensor** or **Indoor Unit** and then selecting **Yes** or **No**.







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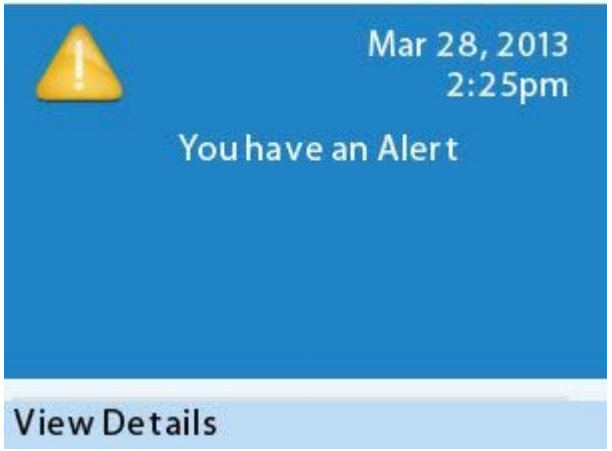
Configuring the Daikin ENVi Thermostat – List of Alerts

Below is a complete list of alerts. Depending on your configuration, some of these may not apply.

- **Low Temp Alert:** Temperature in the home is too low.
- **High Temp Alert:** Temperature in the home is too high.
- **Heat Not Responding :** The system has failed to heat the home.
- **Cool Not Responding:** The system has failed to cool the home.
- **System Service:** HVAC system due for regular maintenance.
- **Auxiliary Heat Run Time:** Auxiliary heat source is running too often.
- **Auxiliary Outdoor Temperature:** Your auxiliary heat has been called to run when the outdoor temperature exceeds the programmed set point.
- **System error, service required:** System error occurred. If the Inddor Units's status LED is blinking after the error has been corrected, select **Settings ▸ Installation Settings ▸ Force System Off** to reset the latched error status and turn off the blinking LED.

•**Lost Communication**: Communication with the Indoor Unit has been lost. Check the wiring connections between the DPCA, ENVi thermostat and Indoor Unit. The green LED on DPCA should be on and solid.
•Upon initial power up of the system communication, this alert may be generated. Wait up 10 minutes for system to initialized before troubleshooting. The alert will be removed automatically once communication has been established.



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Registering the ENVi – Step 1 (select Register)

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Registering the ENVi – Step 2 (connecting to Wi-Fi)

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Registering the ENVi– Step 3 (connecting to Wi-Fi)

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Registering the ENVi– Step 4 (connecting to Wi-Fi)

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Registering the ENVi – Step 5 (connecting to Wi-Fi)

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Registering the ENVi – Step 6 (connecting to Wi-Fi)

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Registering the ENVi – Step 7 (connecting to Wi-Fi)

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Registering the ENVi – Step 8 (connecting to Wi-Fi)

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Registering the ENVi - (connecting to Wi-Fi)

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Registering the ENVi – (connecting to Server)

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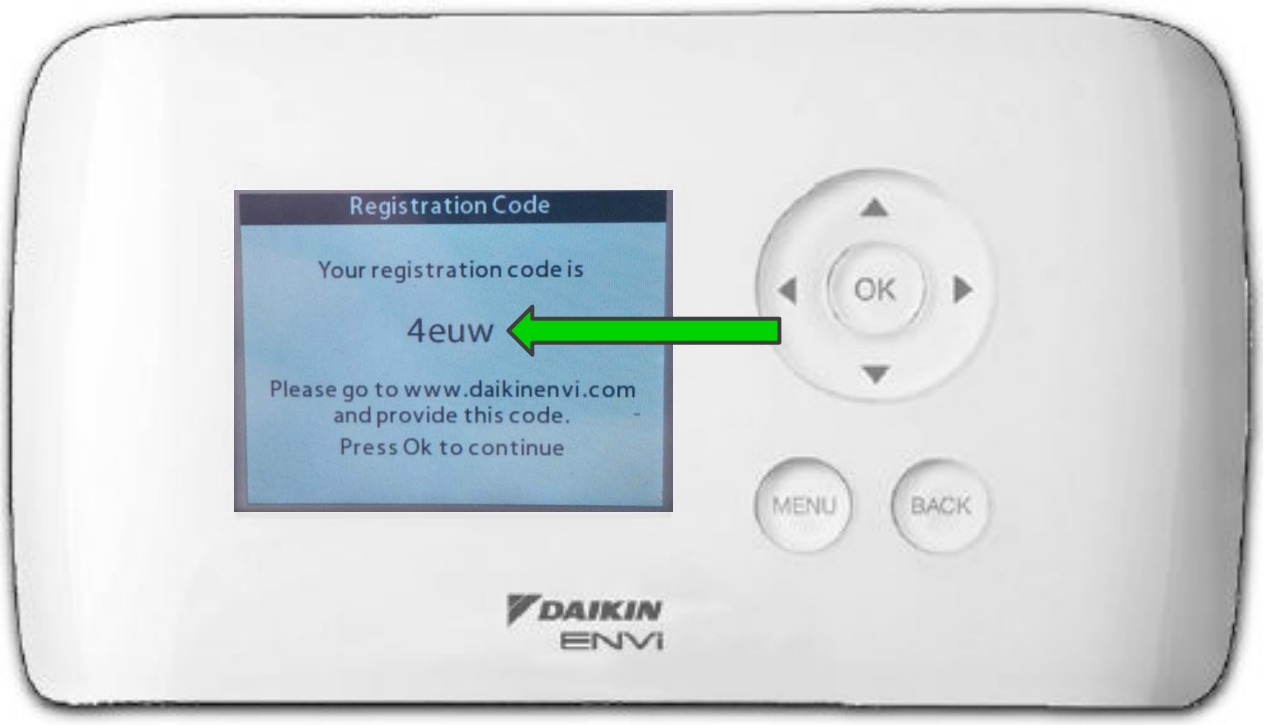
Registering the ENVi – Step 9 (registration code)



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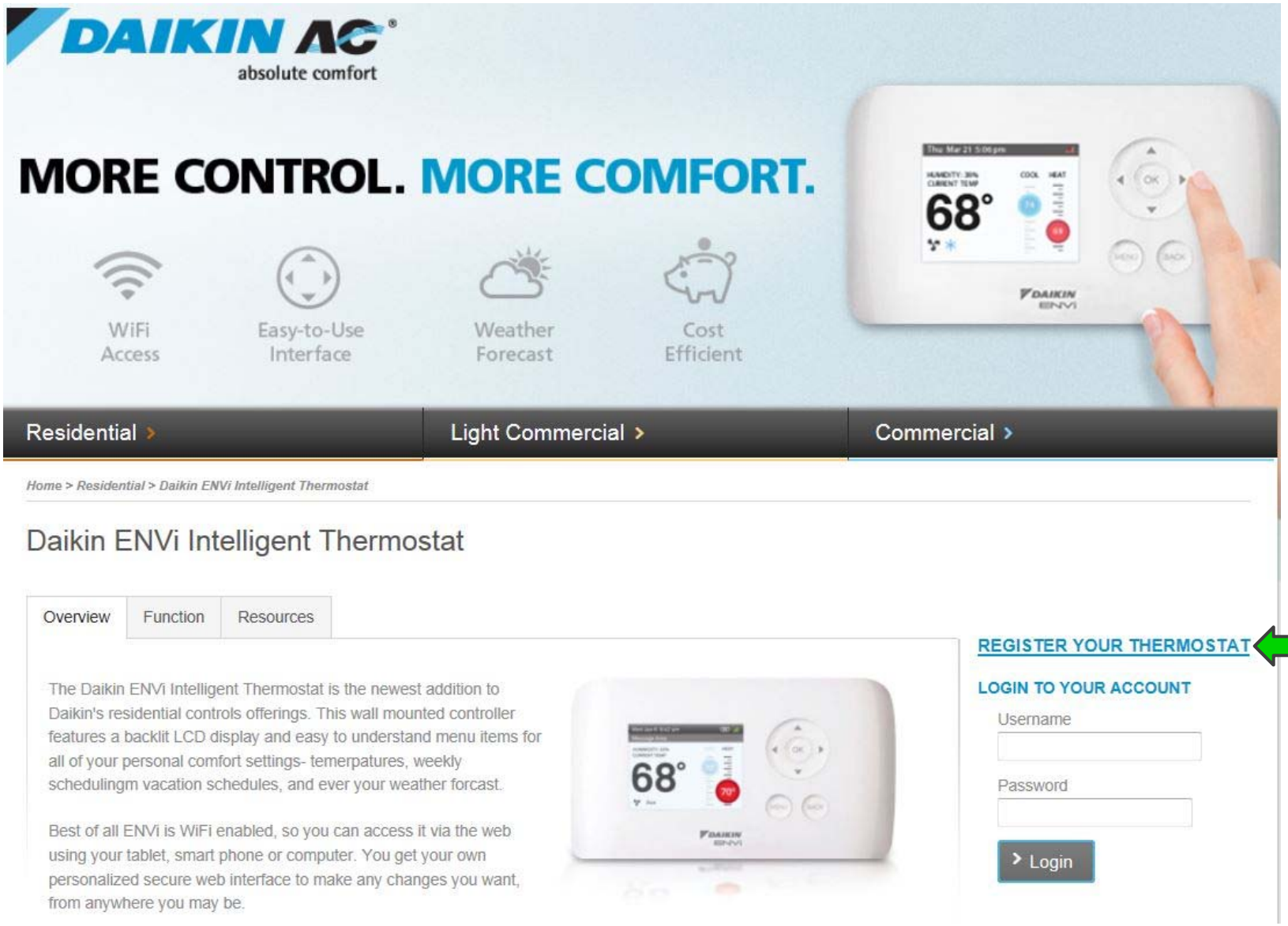
Registering the ENVi – Step 10 (online @ www.DaikinENVi.com)



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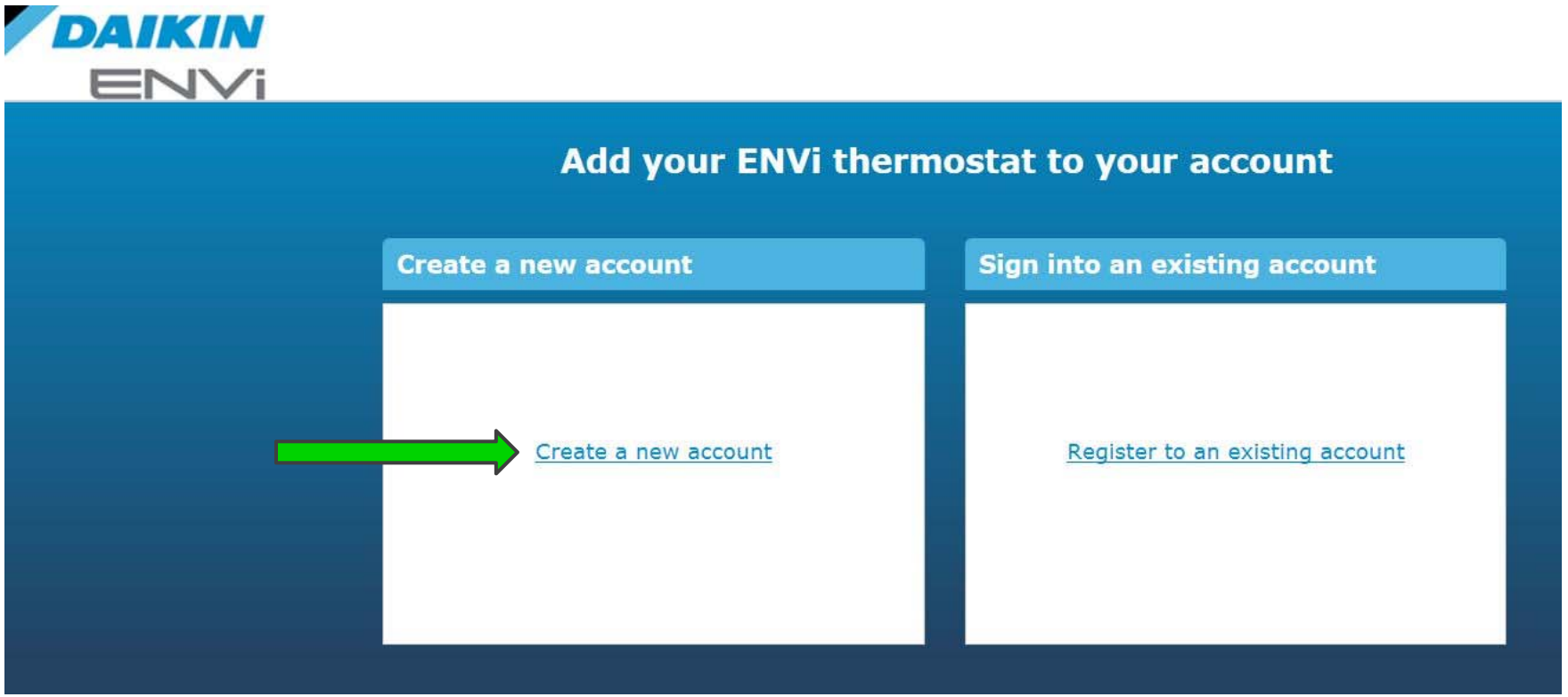
Registering the ENVi – Step 11 (Registration online)



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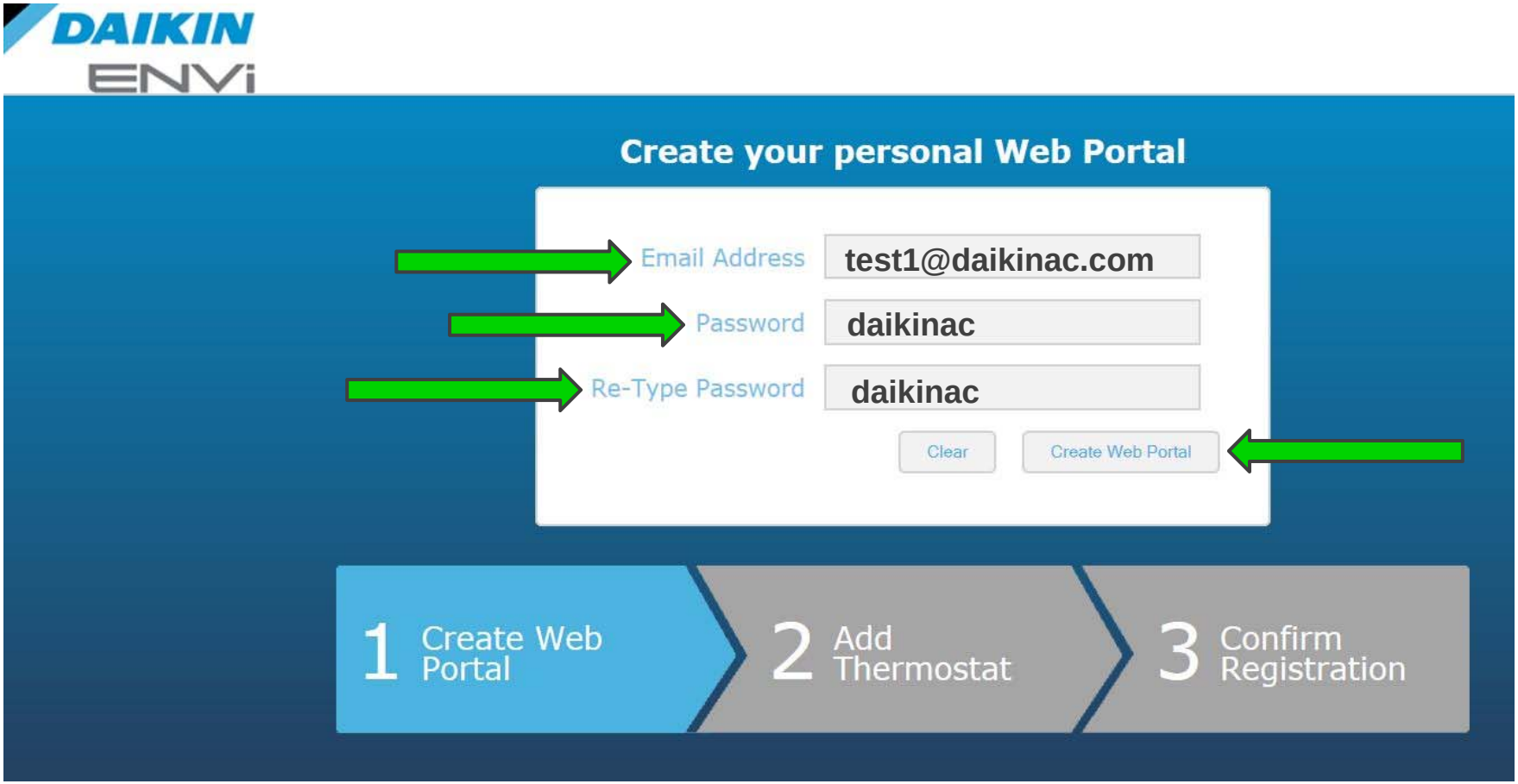
Registering the ENVi – Step 13 (Registration online)



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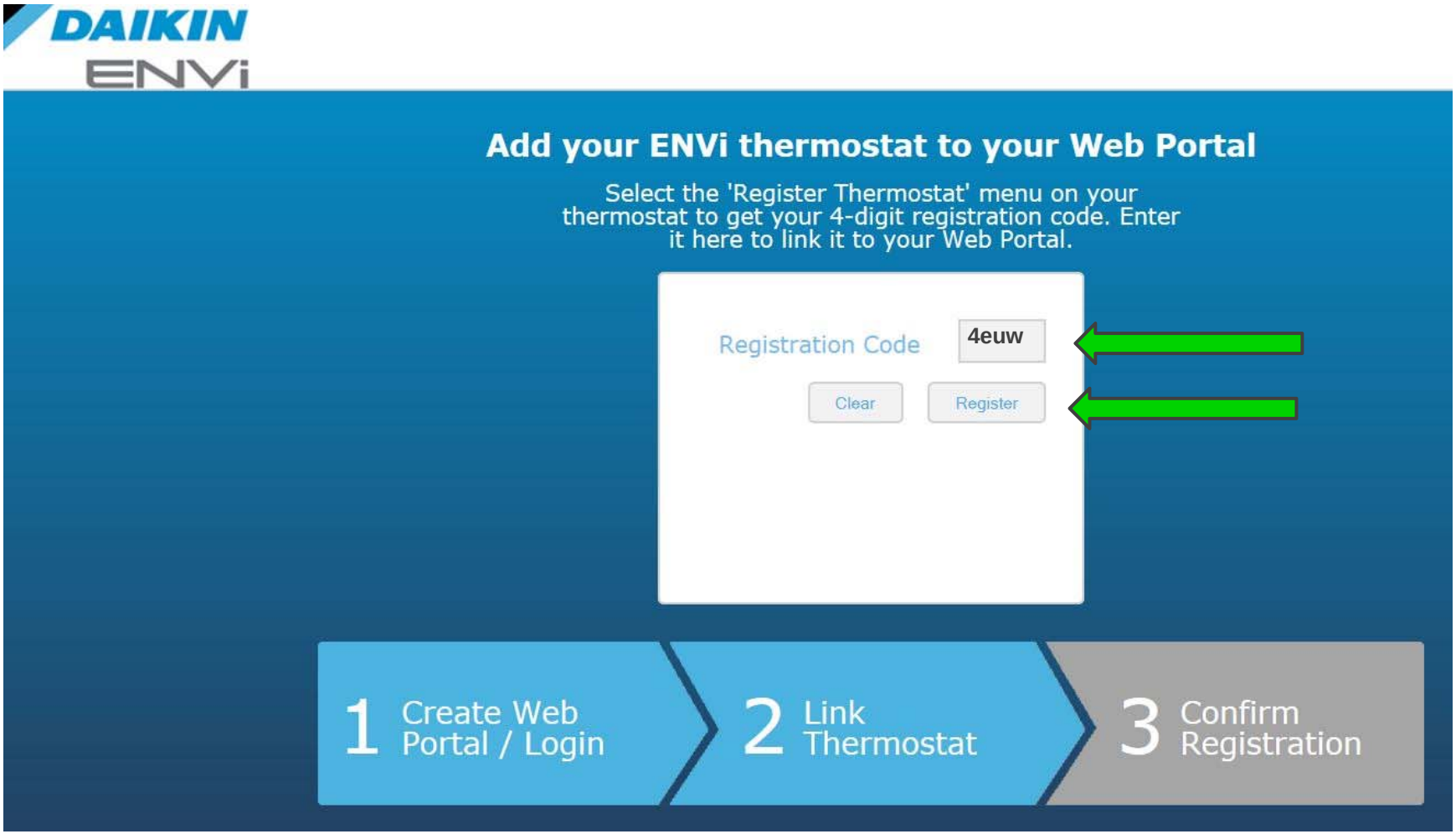
Registering the ENVi – Step 14 (Registration online)



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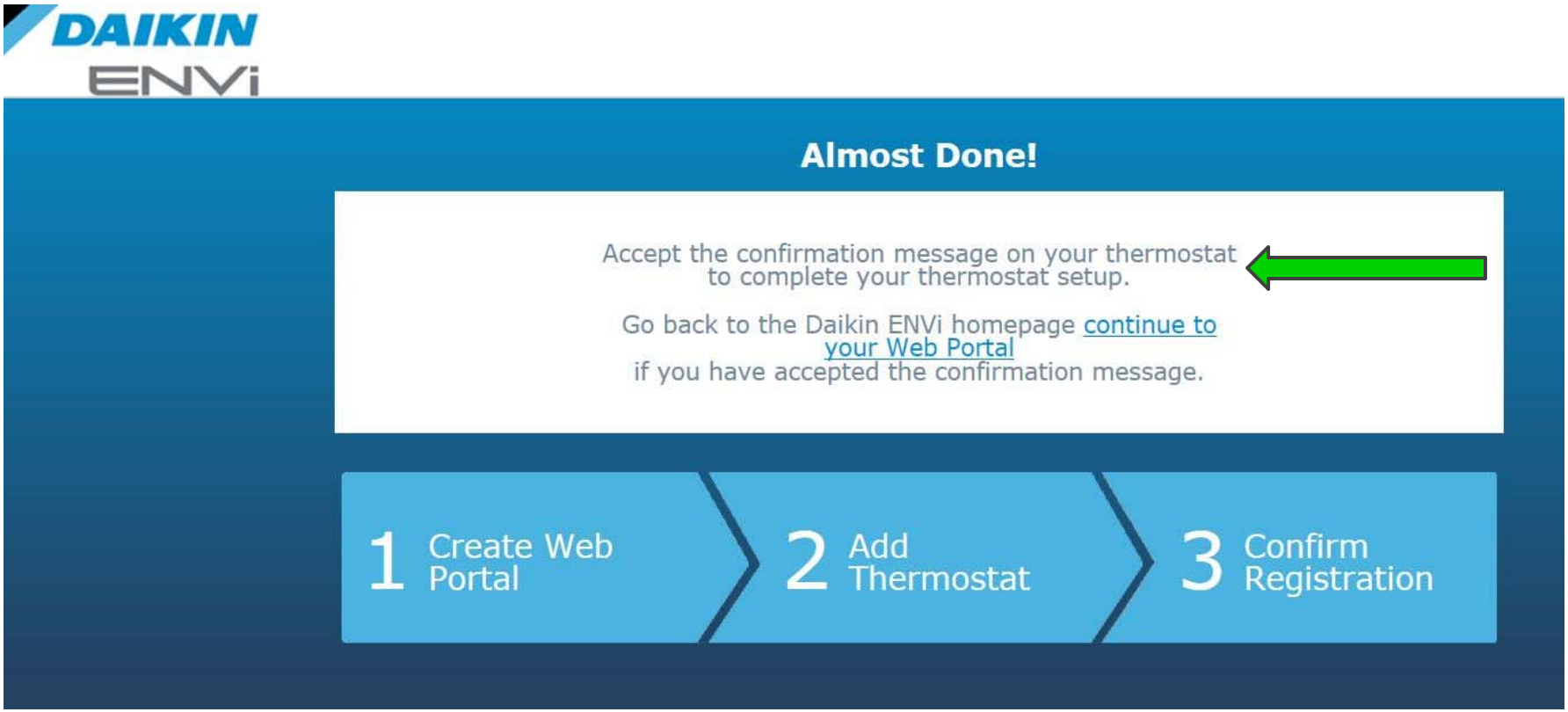
Registering the ENVi – Step 15 (Registration online)



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Daikin ENVi system overview (web-based thermostat)

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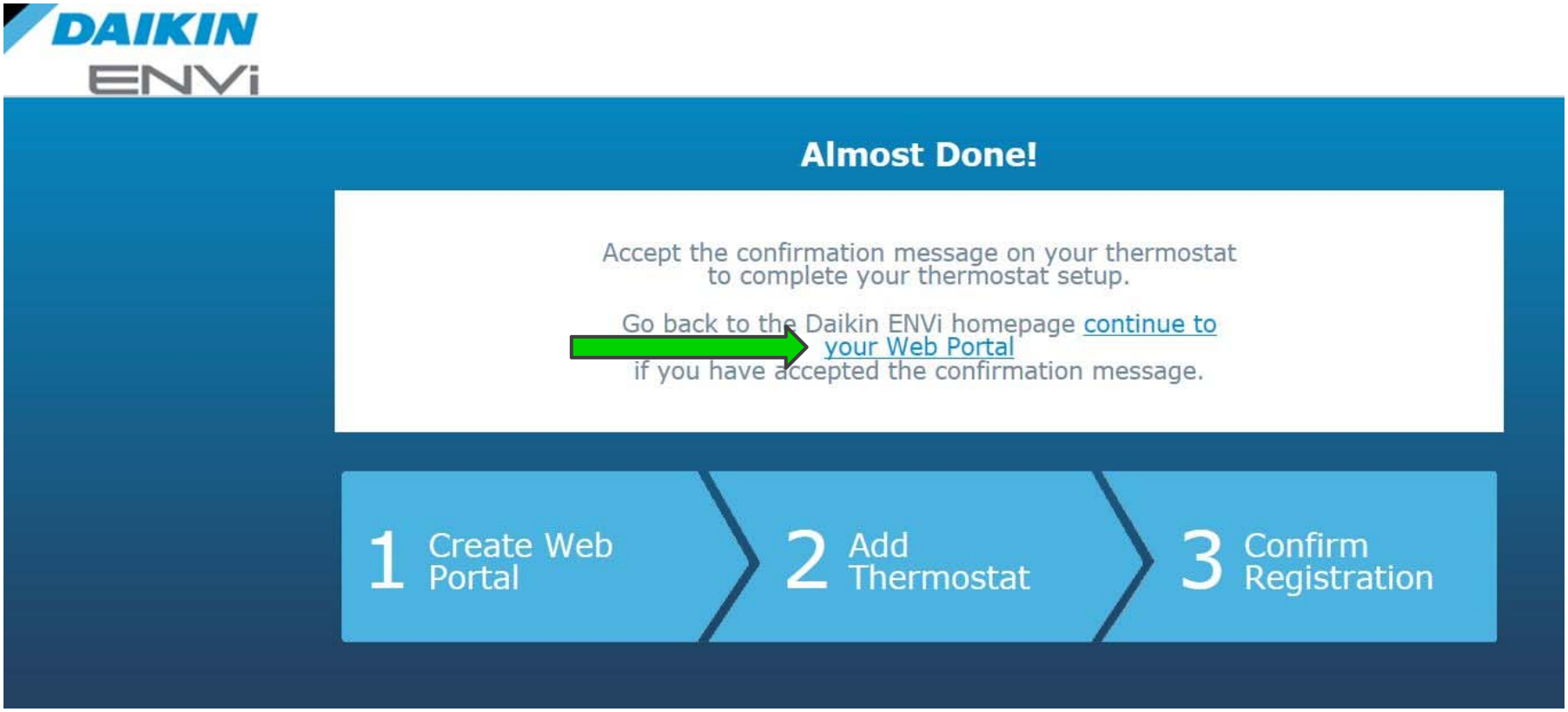
Registering the ENVi – Step 16 (Registration online)



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Registering the ENVi – Step 17 (Registration online)

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Registering the ENVi – Step 17 (Registration online)

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I agree to the terms of the Privacy Policy and the Service Agreement.* ☑

Please notify me of free software upgrades and the latest feature releases. ☑

Done

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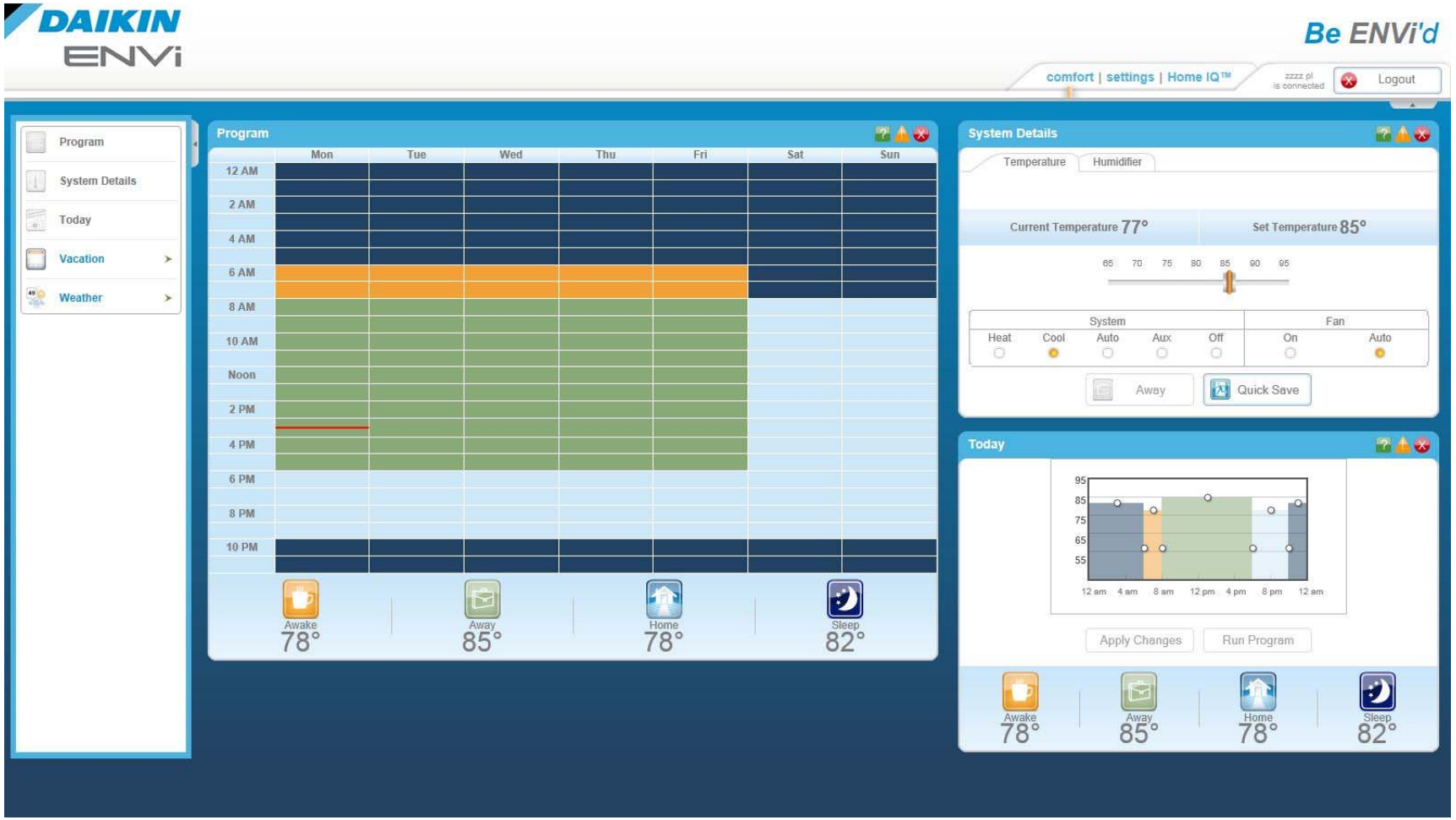
The end-user Web Portal



End-User is re-directed to their personal web-portal upon completing registration.

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Registering the ENVi – completed!

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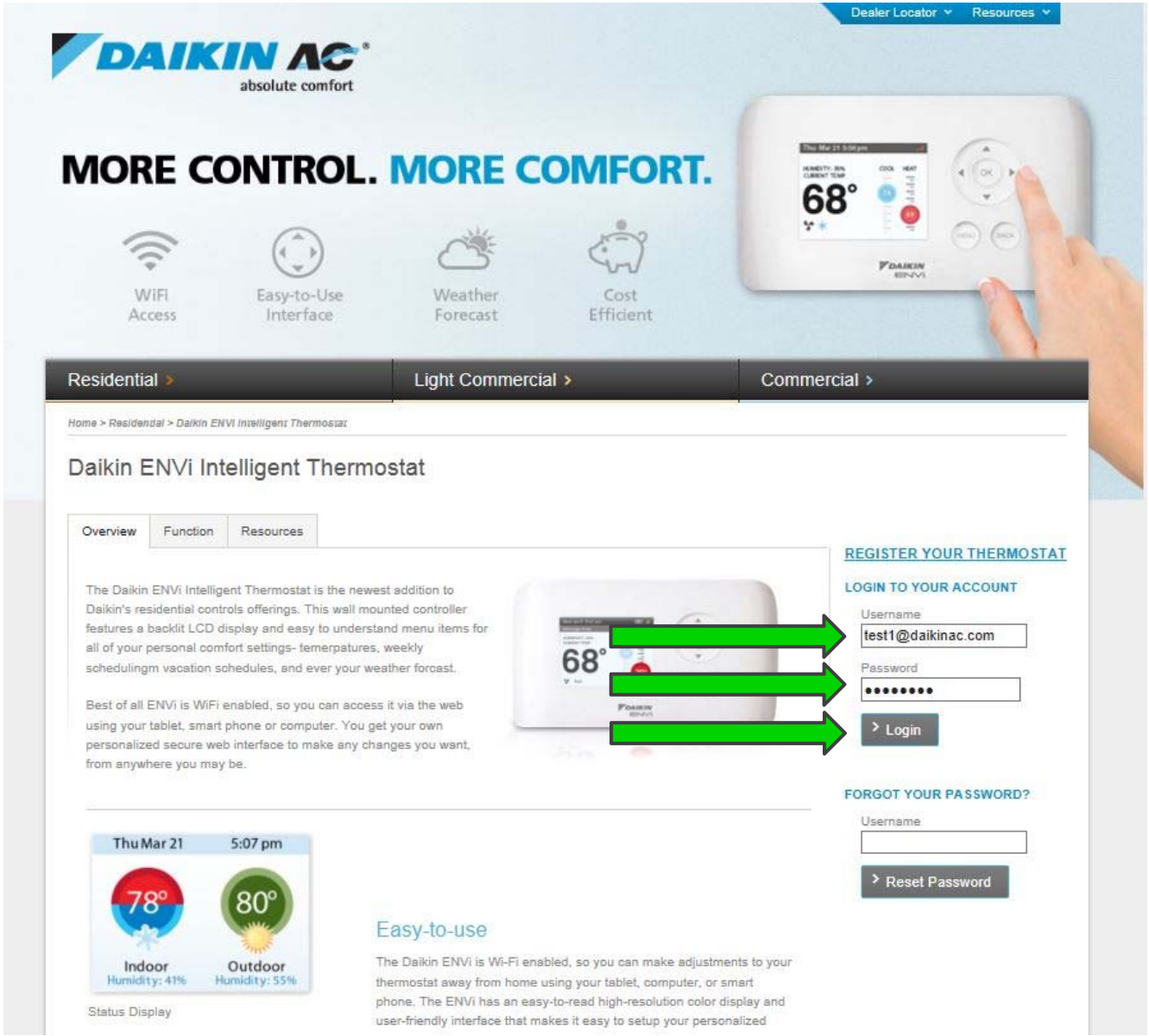
Accessing the Web Portal- www.DaikinENVi.com

1. Enter Username
2. Enter Password
3. Click Login



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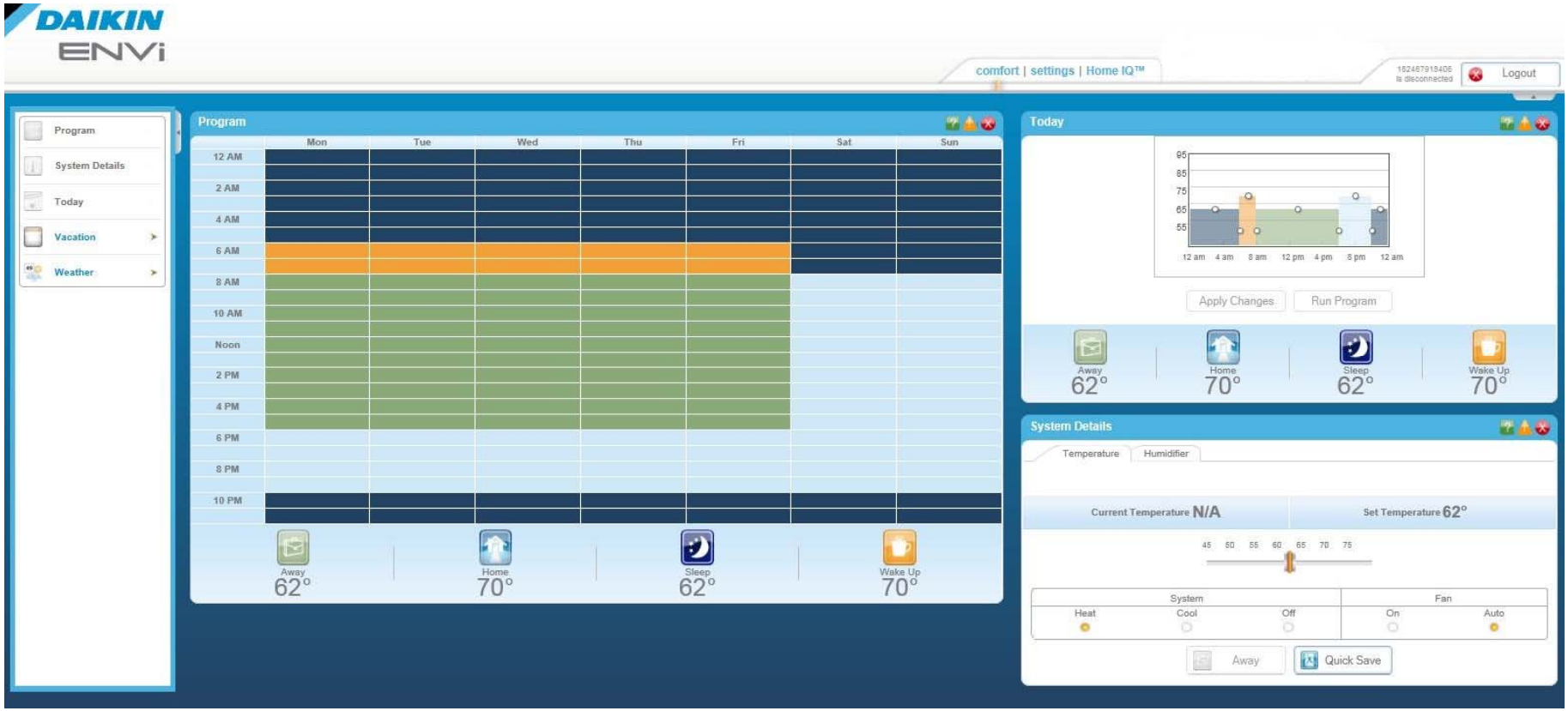
Accessing the Web Portal- the Comfort tab



Comfort

Program: this allows the user to modify the 7-day program, adjust their set-points, fan operation and add new climate periods.
System Details: the user can override the 7-day program, change system mode or change fan operation.
Today: this provides the function to modify the current day program without the need to permanently modify the 7-day program.
Vacation: the user can define a range of dates/times, choose a heat/cool set-point and fan status to override 7-day program.
Weather: provides current day forecast + 4 days in advance.

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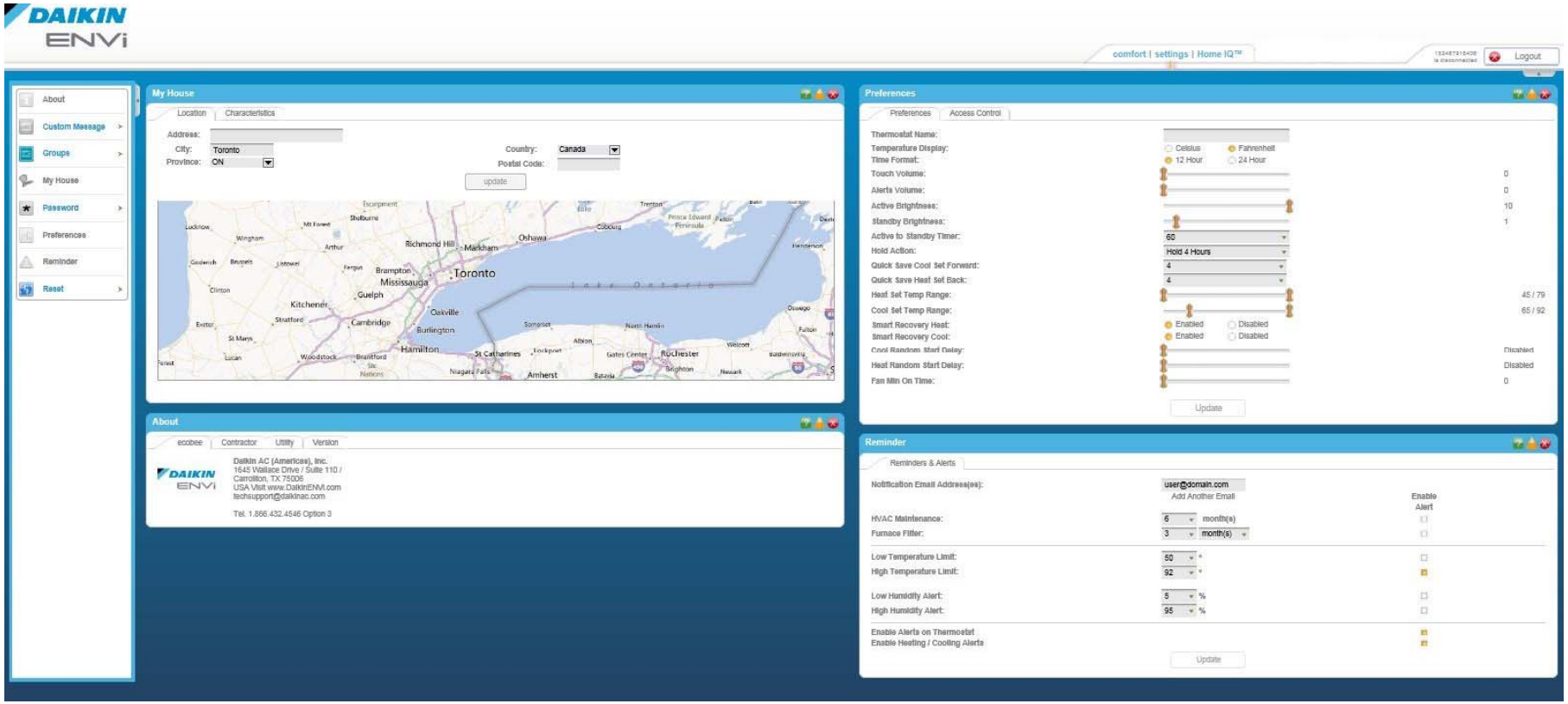
Accessing the Web Portal- the Settings tab



Settings

About: provides information about the product, software version and if linked to a Contractor Portal.
Custom Message: user can send message to thermostat from web portal.
Groups: allows the user to group multiple thermostat's together to share Programs, Preferences, Reminders, etc.
My House: the physical address to which the thermostat has been registered to.
Password: user can change password from here.
Preferences: user can change thermostat preferences from this widget. (e.g. Celsius / Fahrenheit, Hold Action, etc)
Reminders: the user can define what type of alerts and frequency to provide by email, on thermostat or web portal.
Reset: to reset Registration or Programs & Preferences.

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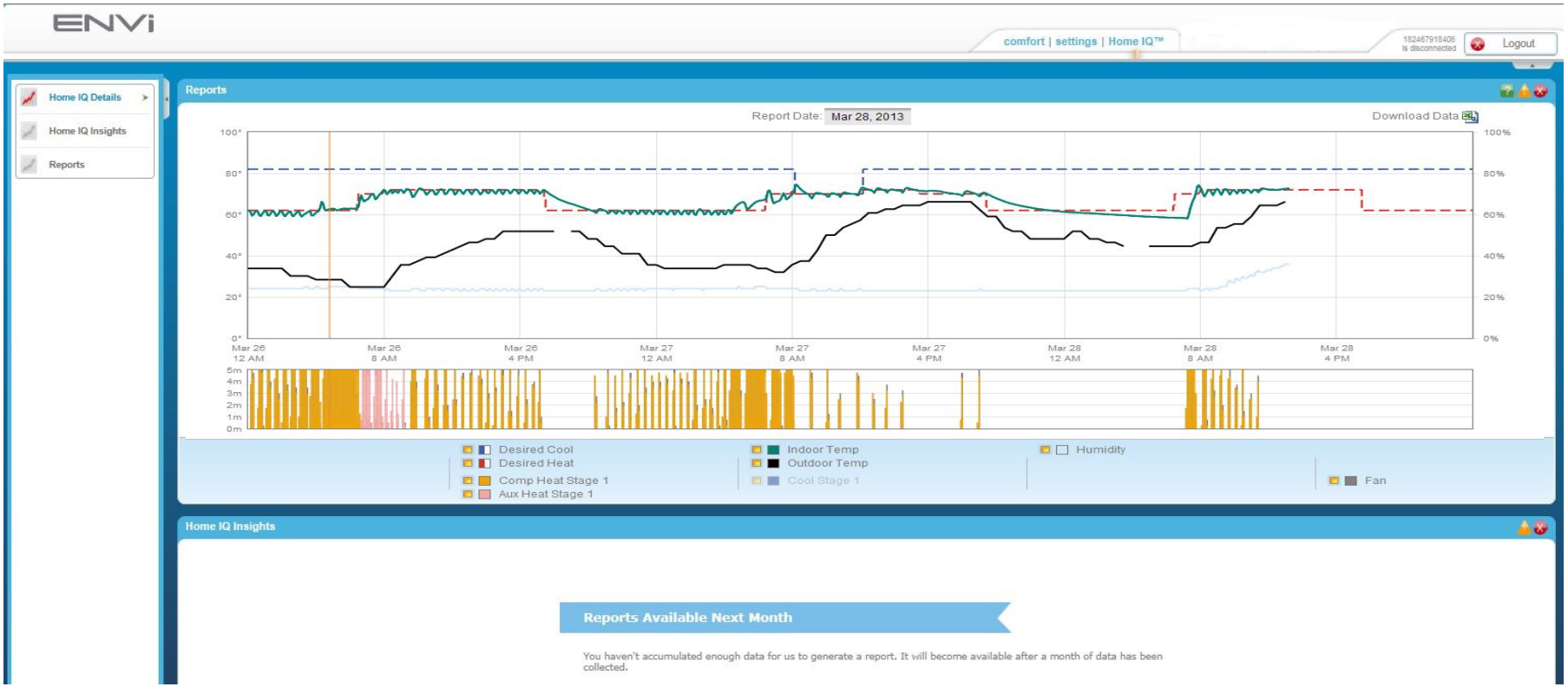
Accessing the Web Portal- the HomeIQ™ tab



HomeIQ™

Home IQ Details: a month over month / year or year direct comparison of heating & cooling runtimes
***Home IQ Insights*:** a month over month summary of HVAC runtimes and what variables had influence on energy usage
Reports: provides HVAC runtime operation for current day and the previous 2-days

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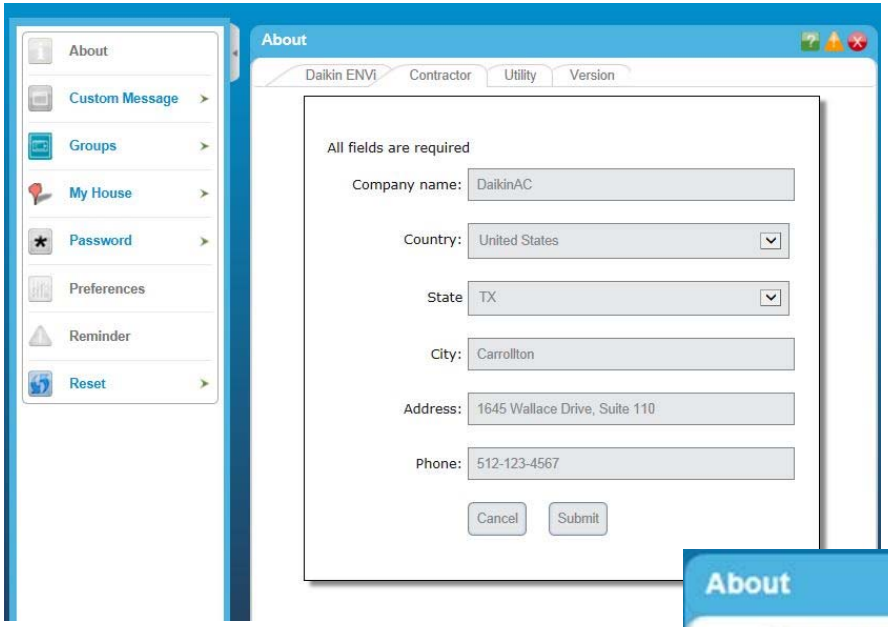
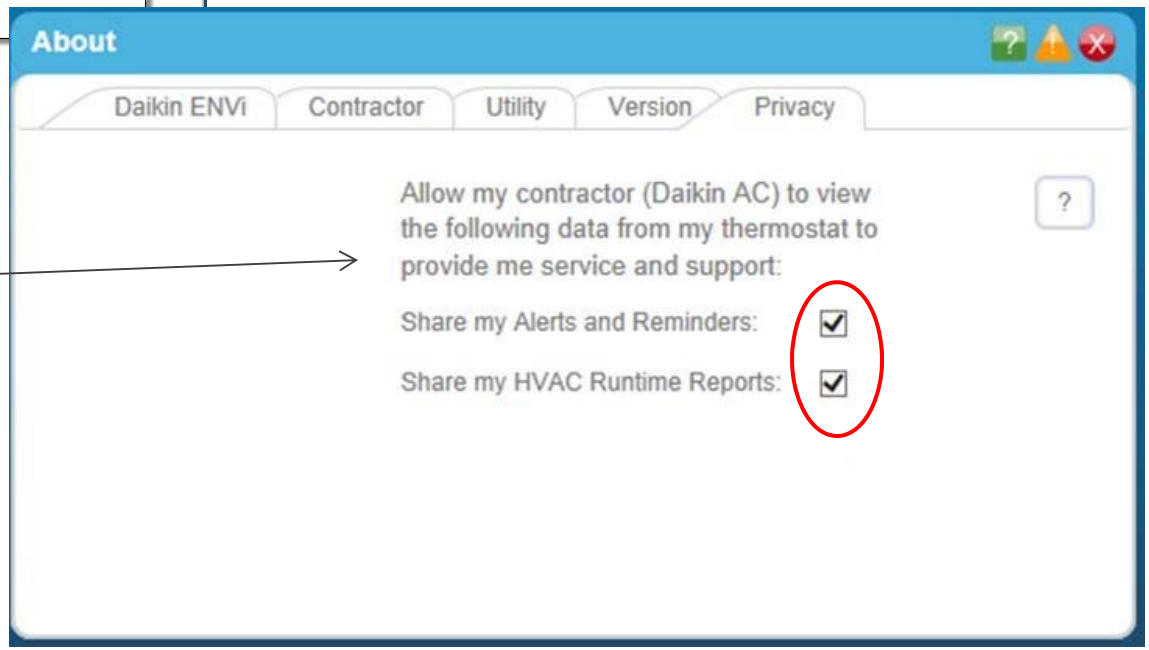
End-User Privacy Setting



The contractor will link the customer's DaikinENVi thermostat to their Contractor Portal. (See slide 61).
Then the customer will see the contractor information at the Settings tab > the About widget > Contractor tab.

From the Privacy tab the customer can select the following options and allow their contractor to view :

- Share my Alerts and Reminders
- Share my HVAC Runtime Reports



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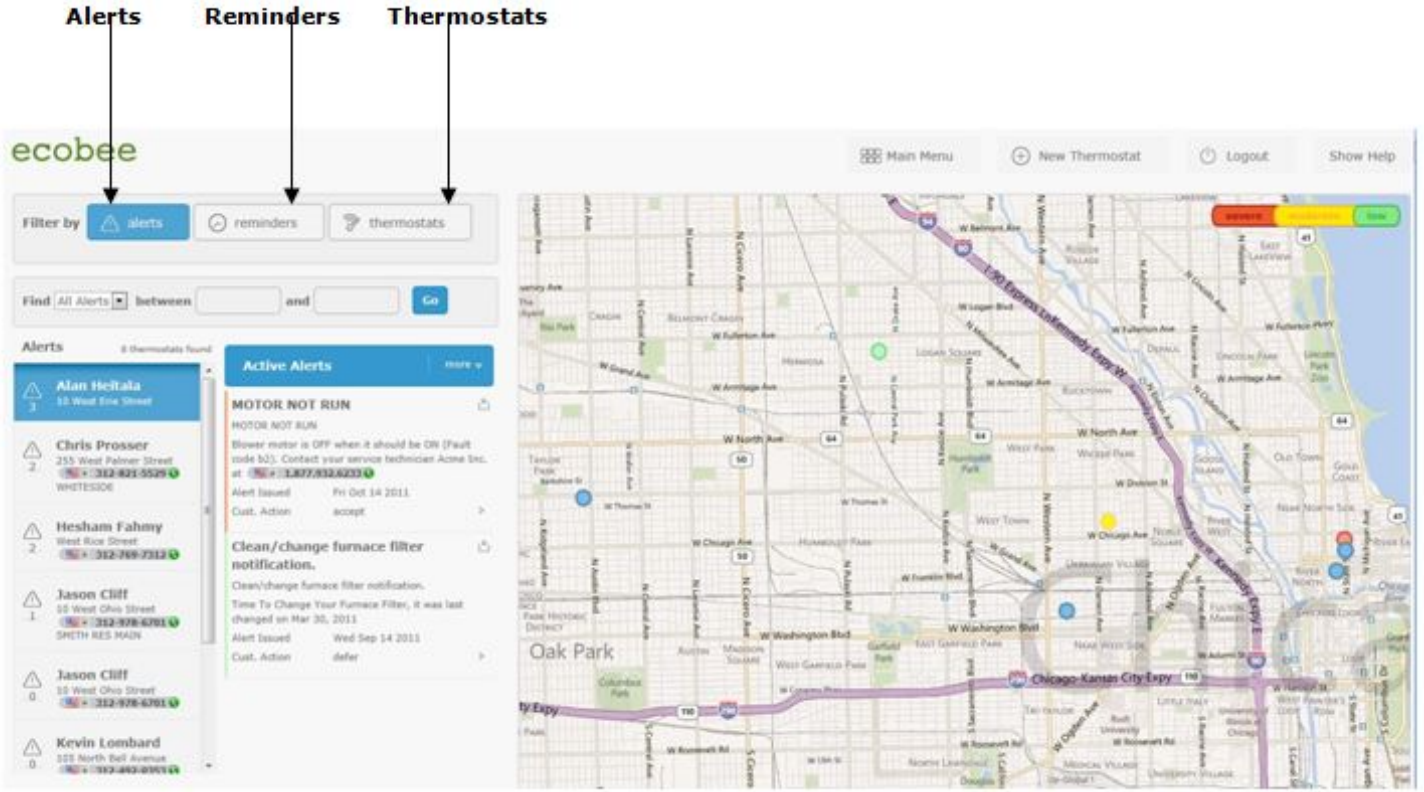
You can choose to filter the thermostats linked to your account by **alerts**, **reminders**, or **thermostats**.

- Clicking on the **alerts** tab will retrieve all the thermostats linked to your account, sorted by the number of alerts not yet acknowledged by you.
- Clicking on the **reminders** tab will retrieve a list of all of the thermostats linked to your account, sorted by the number of impending service reminders over the next month.
- Clicking on the **thermostats** tab will retrieve a list of all of the thermostats linked to your account, sorted by customer name in alphabetical order.



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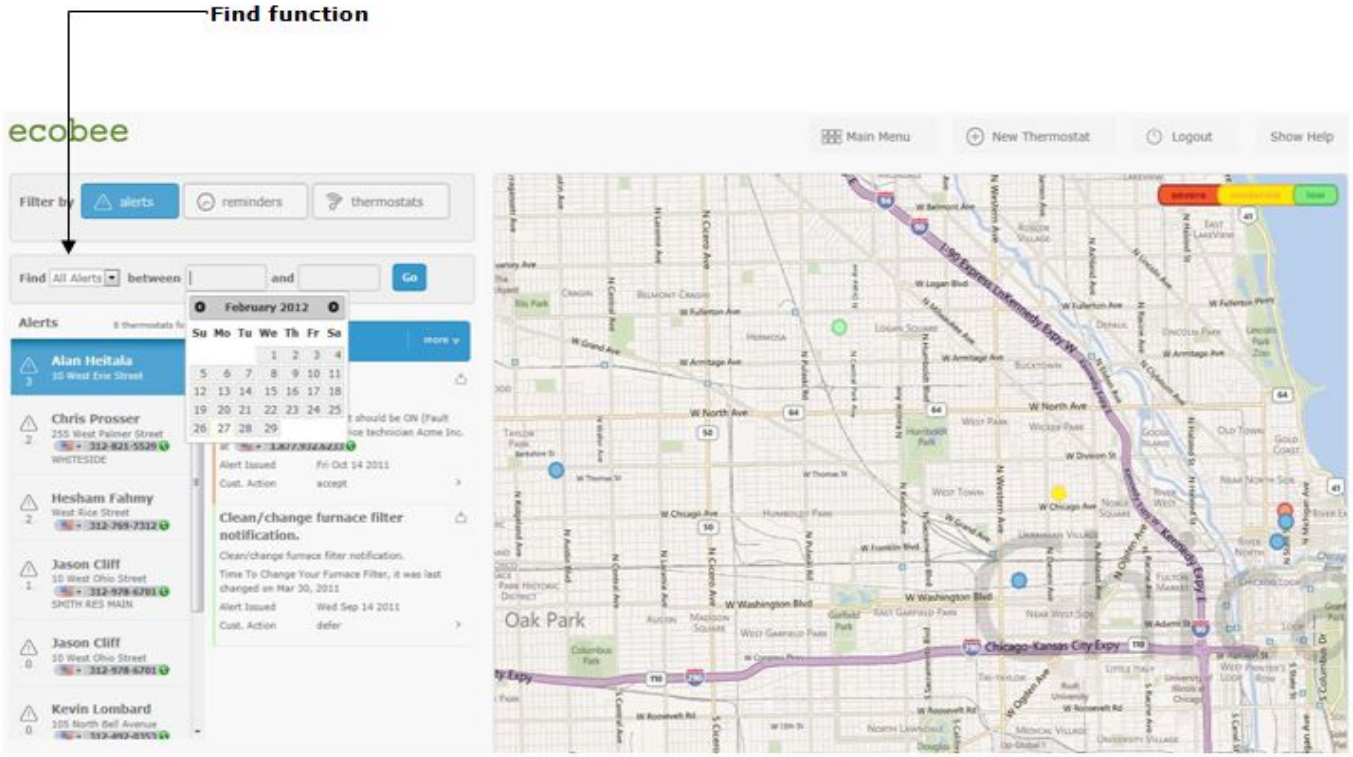
You can use the "Find" function to refine your search even further.

- **Alerts**: if you have selected to filter your search by **alerts**, you can further refine it by selecting the alert severity (low, medium, severe), and/or alerts issued between a given date range.
- **Reminders**: if you have selected to filter your search by **reminders**, you can further refine it by searching for a specific reminder type (such as Filter Replacement), and/or reminders due within a given date range.
- **Thermostats**: if you have selected to filter your search by **thermostats**, you can further refine it by searching for a street address, a phone number, a first/last name, or by serial number.



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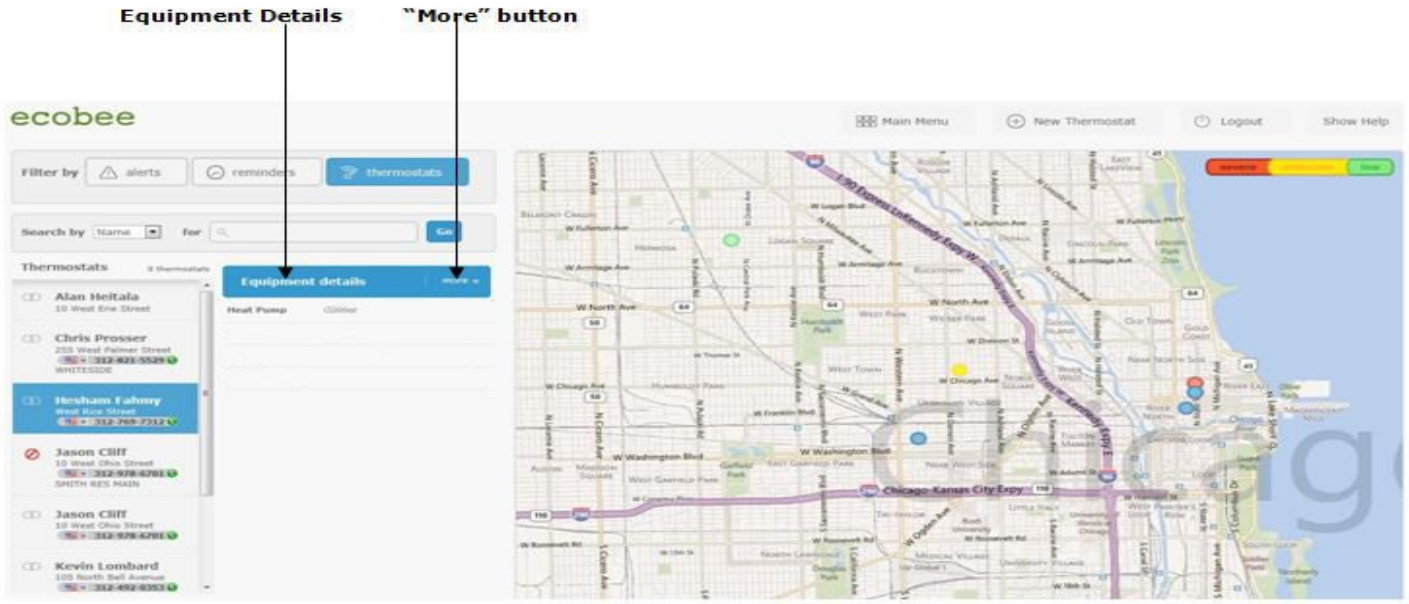
The Detail Pane:

The detail pane will display all relevant details for a selected thermostat from your populated search list. Once you have selected a thermostat, click on the "more" button for additional views including: **Alerts**, **Archived Alerts**, **Reminders**, **Equipment Details**, **Customer Information**, and **HVAC Reports**. Note: you must select a thermostat in order to view these details.

- **Alerts**: this view includes a list of the alerts associated with a selected thermostat that have not yet been acknowledged by you.
- **Archived Alerts**: this view includes a list of the alerts associated with a selected thermostat that have been acknowledged by you in the past, for historical reference.
- **Reminders**: this view includes a list of all upcoming service reminders associated with a selected thermostat. You have the ability to manually edit an HVAC Service Reminder, however all other equipment reminders are in read-only format.
- **Equipment Details**: Editable by you, this view includes the serial number of a selected thermostat, as well as the make, model, and serial number of your customers' HVAC equipment.
- **Customer Information**: this view provides you with detailed customer information associated with a selected thermostat including first/last name, address, phone number, thermostat serial number, alerts, reminders, reports and connectivity status.
- **HVAC Reports**: this view enables you to see your selected thermostats' HVAC equipment report graph, dating back two days.

Note: when Auxiliary has been configured it will be indicated in the Contractor Portal as "Furnace".



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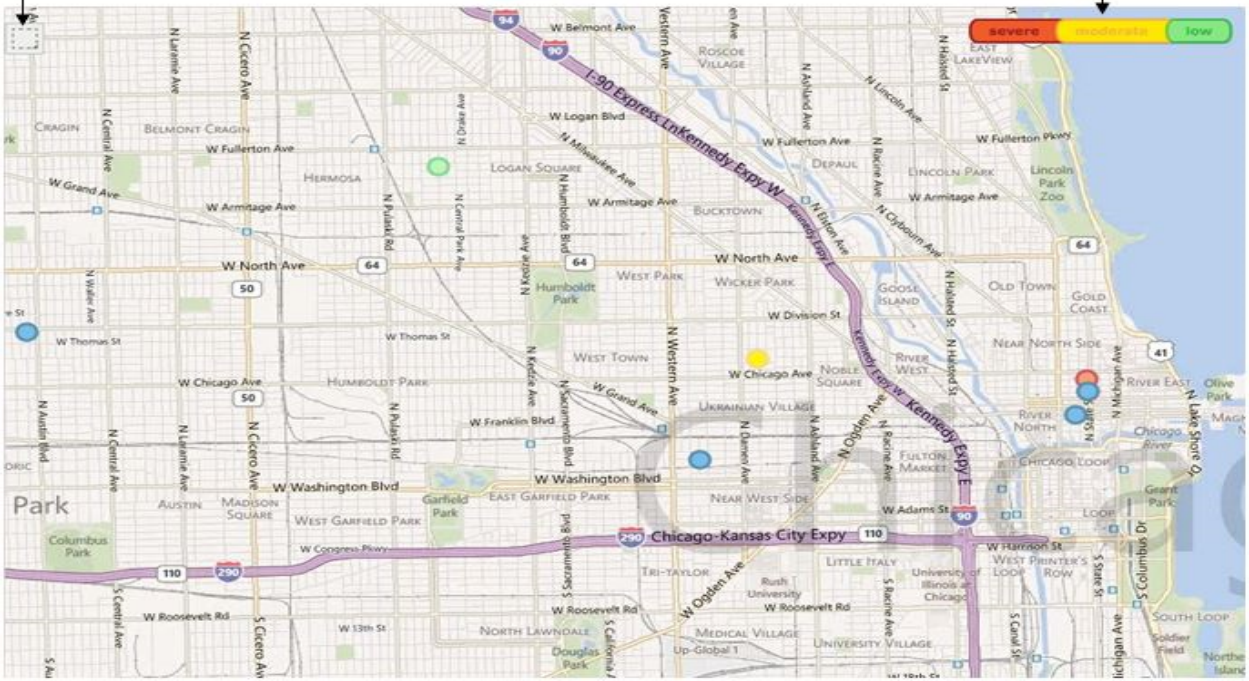
Map View:

The interactive Map View will display all of the thermostats linked to your account by color-coded markers on the map, as specified by your search parameters. When a thermostat is selected in the Thermostat List, the map will automatically adjust itself so that the selected thermostat is in the centre of the map. An informational pop-up will also appear, displaying the customer name, address, phone number, and thermostat serial number of the selected thermostat.

- **Color Schemes**: a color-coding scheme will identify thermostats with alerts or reminders by severity (red = severe, yellow = moderate, green = low). A default blue marker will represent thermostats that have no active alerts or reminders
- **Multiple Selection Tool**: if your thermostat list is set to filter by reminders, you have the ability to select an unlimited number of thermostats in any given area. This will allow you to create bulk actions, such as setting service reminders for several thermostats in a given location at once. To enable this feature, simply click the "Select On" button in the top left hand corner of the map, and your cursor will transform into <> symbol. Then, create a selection box with your cursor to select numerous thermostats in the area you want. By doing this, all of the selected thermostats in the Thermostat List will be highlighted, enabling you to perform bulk reminder actions. By clicking the "Select Off" button, your cursor will transform back into the hand symbol and you can scroll through the map in various directions by clicking and dragging your mouse.

Multiple Selection Tool **Color Schemes**



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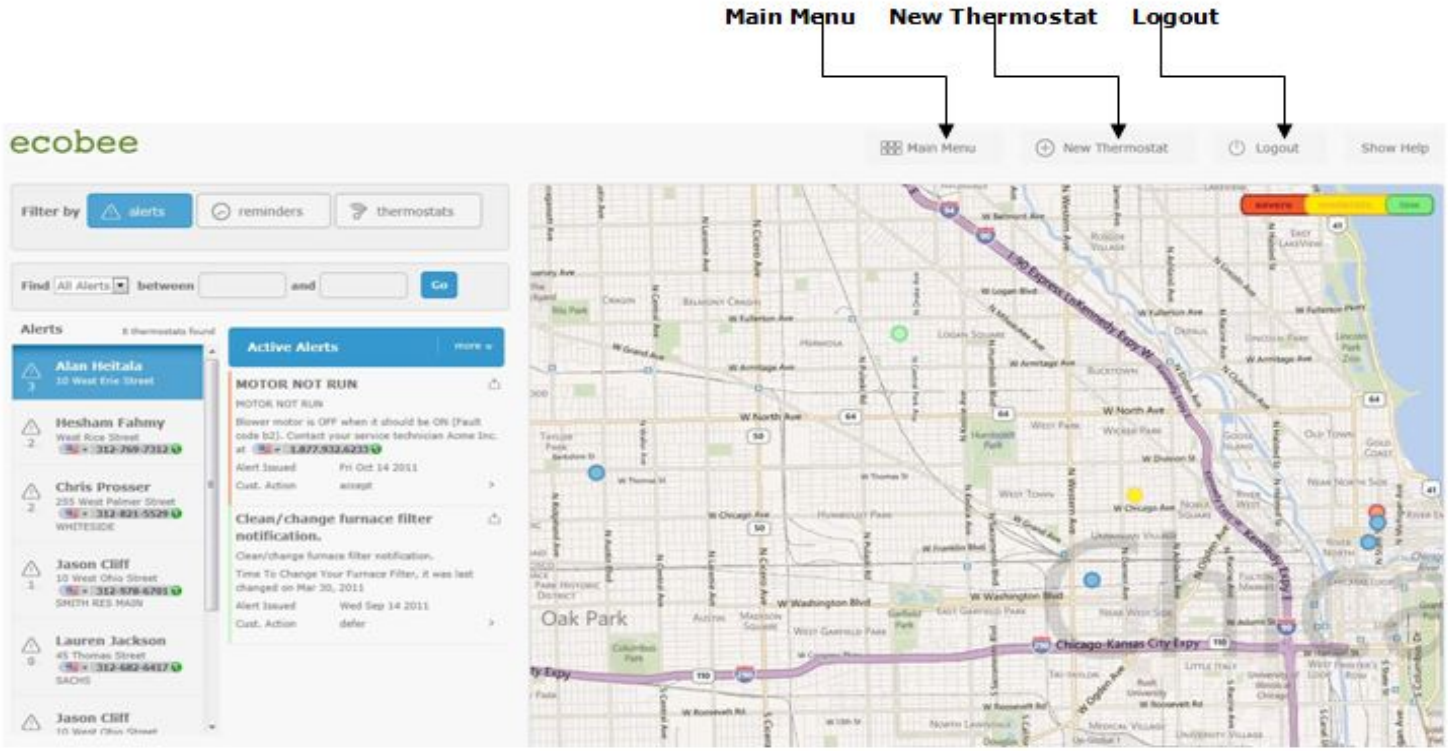
Contractor Portal

Main Navigation:

- **Main Menu**: Clicking on the Main Menu button will return you to your Contractor Web Portal dashboard.
- **New Thermostat**: By clicking on the "New Thermostat" button, you have the ability to link new thermostats to your account. Simply type in the 9-digit serial number of the thermostat you would like to link to your account. To add another thermostat, click "Add Another Thermostat", and when you're finished, click "Add".
- **Logout**: Click on the Logout button to end your Contractor Web Portal session.



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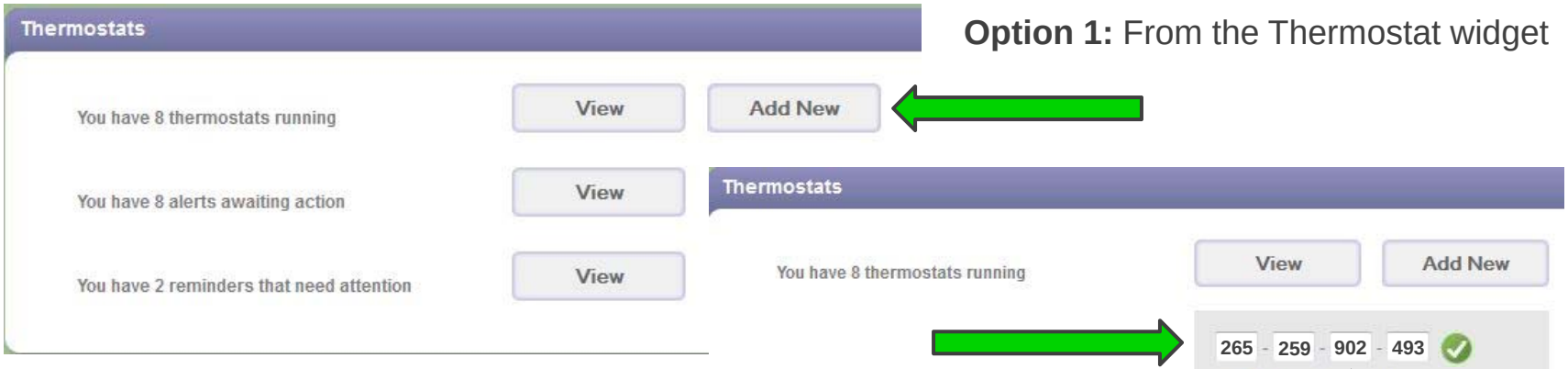
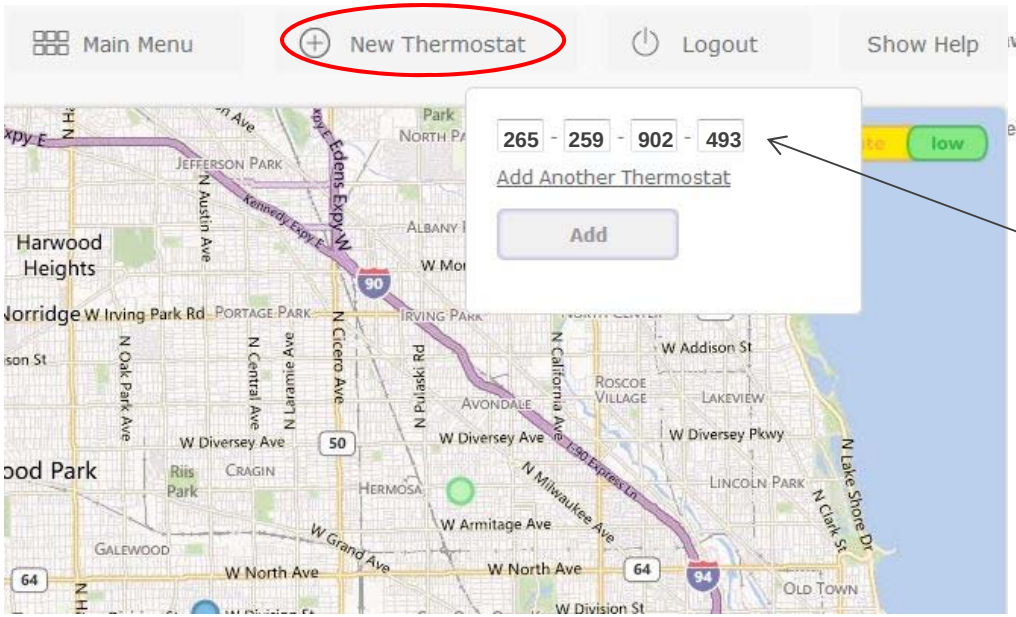
Option 1: From the Thermostat widget



Option 2: From the Main Navigation page



Thermostat serial # can be obtained from the serial # sticker in the thermostat box. It is a 12-digit serial #.

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Thank You

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